

*ENTRUDO: ETHNOGRAPHY OF THE CONTEMPORARY CHALLENGES OF  
AZOREAN INFORMAL EDUCATION IN LIGHT OF ECOPELAGOGY*

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## Abstract

Ecopedagogy demands we identify non-orthodox educational practices, under the assumption that only by valuing marginal or unconventional experiences we could face the educational challenges emerging from globalization. My dissertation opens with a theoretical study that is dedicated to the establishment of the best epistemological categories to tackle the above issue. In doing so, it assesses different investigative approaches and eventually sides with Lave and Wenger's 'communities of practice.' Furthermore, the research establishes criteria for the operationalization of the above framework by identifying two specific epistemological concepts—situatedness and practice—and their related operationalizations: 'negotiability continuum' and 'apparatus complexity.' These operationalizations are furtherly identified as the key to detect 'peripheral participation,' which is key to well-functioning communities of practice. In doing so, it demonstrates compliance with genealogical research. After the establishment of such theoretical baseline, research unfolded in three stages: desk research and early Rapid Assessment, participatory activity with a team of four native assistants for the production of a scholarly outcome, and revision of such outcome in light of further fieldwork research to validate intermediate results. This main study, which lies at the core of the project, was undertaken in Terceira Island, belonging to the Azores Autonomous Region of Portugal. Desk research shows that Terceira Island is an outermost European territory with a long-standing cultural heritage that resisted commodification on behalf of different market actors. Moreover, owing to the idiographic singularity constituted by its Carnival with regards to its European counterparts, it qualified for fieldwork activities. Fieldwork results were reinterpreted by native assistants and another hermeneutical iteration was accomplished following thematic analysis drawn on further fieldwork activities. The latter entailed non-structured interviews with 'culture experts.' In sum, research outcomes show that Terceira's

Carnival is a good case of cultural heritage for ecopedagogy, as it features a healthy management of peripheral participation, which had been previously identified as paramount to educational success. Thus, Terceira's Carnival is theorized to be a permanent workshop that simulates total social phenomena to foster the negotiation of identity for different groups of islanders according to historical contingencies. Consequently, it appears as a flexible heritage apparatus that could be deployed by different strategic *dispositifs*.

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# 1. Introduction

## 1.1. Theoretical inquiry

*Chapter 2* begins with a theoretical reflection on the categories of formal, non-formal, and informal education. Examination of state-of-the art literature shows that such categories, although historically entrenched in an attempt to value educational experiences external to Western schooling, is unable to fully grasp the complexity of the phenomenon of education. If anything, scholars claim, formalism is an ‘attitude’ of given educational settings, rather than an objective character that is set in stone.

### *1.1.1. Shortcomings of mentalistic accounts of education*

Talking of disposition, in education, it feels natural to look at other solutions to shortcomings of the formal–informal continuum. A solution that is taken into account is that of Strauss, who tried to reframe education in terms of intentionality. Her contribution is valuable, inasmuch it helps to overcome the Western bias that is inherent to the formal–informal continuum. Thus, her framework contributes to the inclusion of other cultures in scientific ‘discourse’ of education science.

Notwithstanding the above, Strauss’ framework displays some limits. The biggest one is its mentalistic approach, which does not take into account the fact that most education takes place *outside* the learner. That is, there should be an analytical distinction between what learning is and what education is. Drawing on the literature, I maintain that the former is predicated of the individual and the latter is predicated of a community that enjoys some specific characteristics. In order to illustrate this point, I draw on the example of bullfighting

training in Terceira Island, which is an anticipation of the fieldwork activity that fuels the empirical part of this dissertation.

### *1.1.2. Bioecological developmental model versus peripheral participation*

To Strauss, I oppose the renowned competency-based view of education and attempt to consider explanatory models that could take into account the supra-individual level of community practices. This leads to a comparison of the work of Bronfenbrenner and Evans with that of Lave and Wenger. Whereas Bronfenbrenner and Evans' bioecological developmental model is tempting, it runs into several conundrums concerning its ability to account for the pervasiveness of culture, which it still considers paramount to an 'external factor' that affects the individual. Instead, Lave and Wenger's communities of practice stand as light in the darkness of mentalistic approaches. In fact, my analysis of Lave and Wenger, which is supported by that of Hoadley, unveils the need in education science to identify areas in which prospective learners can engage in peripheral participation. That is, only through gradual inclusion in a community of practice it is possible to become acquainted with practices and come into contact with experts. This means that a healthy community of practice always makes room for potential members who are performing at sub-standard levels of expertise.

### *1.1.3. A manifesto for education science*

Given the fruitfulness of the 'community of practice' approach, I proceed to cross-evaluate it in light of previous epistemological achievements that constitute the cornerstones of my strategy in education sciences. Namely, I consider Clifford's 'Greater Humanities' paradigm, as well as my application of it to education science, as the most viable manifesto to guide research in the field of education. However, being just a manifesto, it requires further theoretical reflections to derive concepts that are more conveniently applicable to the

identification of communities of practices characterised by adequate peripheral participation. This latter concern leads me to the conflation of four of the fields advocated by the ‘Greater Humanities for education’ paradigm into two categories that could be operationalized. That is, I conflate the notions of empirical realism and historical research and obtain the concept of situatedness; then, I conflate the notions of hermeneutics and value-oriented decision-making into that of practice.

#### *1.1.4. Choice of paradigm: ecopedagogy*

Thusly equipped with a condensed version of my previous humanist framework, I proceed to identify an overarching educational paradigm that is in line with both the values behind Lave and Wenger and Hoadley’s principles, as well as those of Clifford. The solution is offered by Gadotti’s ecopedagogy, which I illustrate in reference to Misiaszek’s synthesis of it. In fact, the latter renders Gadotti’s ecopedagogical approach into a workable set of criteria, which could drive further investigation.

Abidance by ecopedagogy calls into question the usage of general concepts such as ecosystem. Hence, I consider two application of ecosystemic analysis to education science. The first is represented by the specific concept of educational ecosystem and the second is represented by the specific concept of epistemological ecosystem. I show that the two are tied, but that the education ecosystem is a more flexible notion and is better suited at tackling investigative object, whereas the latter is more useful to reflect upon the biases that might affect the educational researcher.

#### *1.1.5. Ecopedagogy and cultural heritage: a theory-induced research question*

This prompts me to anticipate one of the driving concepts behind my empirical investigation: that is, cultural heritage. Consequently, I dedicate the remainder of *Chapter 2* to explore how



heritage could be one of the guiding categories that we could derive from the ecopedagogical approach and what are the best ways to go for it in terms of empirical research.

The resulting framework, which concludes *Chapter 2*, is construed as paradigmatically grounded on ecopedagogy, which prioritizes attention to the way educational settings foster inclusion—precisely as per Lave and Wenger’s ‘community of practices’ approach. With this community-oriented take on ecopedagogy, the investigative priority is set by Misiaszek, whose criteria I transform into a research question that does not ask how we could salvage vulnerable communities but rather asks *how could previously unstudied communities of practice contribute in non-orthodox ways to our understanding of the educational processes?*

This question is grounded on some assumptions: it prioritizes outermost community’s contributions to shared educational knowledge; moreover, it regards the exploration of cultural heritage of such communities as the best heuristic instrument to discover non-orthodox educational practices (that act at a supra-individual level).

#### *1.1.6. Heritage and power*

On top of the above assumptions, I address the issue of the connection between heritage, which has now become the main target of my educational research, with power dynamics. Here, I suggest that ‘power’ should be conceived in a Foucauldian way, since there is likely no educational process or community interplay that unfolds without a power structure being in place. This said, I disavow non-neutral conceptions of power, because their overly critical approach could have the effect of silencing distributed power structure, where power indeed exists but in a non-hegemonic way. In other words, I endeavour to place my research in that niche of Foucauldian genealogy that recognizes the existence of dynamics but does not regard them as *a priori* ethically unpalatable.

Notwithstanding my neutral usage of the concept of ‘power,’ I still believe genealogy is important to reveal how some educational processes have favoured certain groups at given times and places in history. To prove this point, I draw on the country where my fieldwork research took place—Portugal—and present a brief genealogy of its formal education system.

## **1.2. Methodology**

Once the goal is set, with an investigative question that has been derived by my epistemological positioning within ecopedagogy and heritage research driven by a concern for ‘communities of practice,’ I proceed in *Chapter 3* to identify the best tools for data collection, analysis, and interpretation.

Following Handwerker’s recommendations, I begin with analytical categories: they are directly derived from the above epistemological sphere—as per what *Chapter 2* had established—and have a chance to become some of the guiding buzzwords (or factors) to take into account during empirical research. For this reason, I begin by examining them one by one and then immediately subject them to a pilot test.

### *1.2.1. Operationalization*

Here, I will not re-examine the concept of ‘communities of practice,’ which receives due attention both in *Chapter 2* and in one of the sections of *Chapter 3*. Much more relevant, in a methodological scope, are the following concepts I address: that of ‘negotiability’ and that of ‘apparatus complexity.’ Both are meant to be operationalizations of the epistemological categories of situatedness and practice.

By ‘negotiability’ I mean a continuum that goes from challenges that could be overcome with little use of individual resources to challenges that could be overcome only with concerted human action. By ‘apparatus complexity’ I mean the presence—or lack thereof—of a

tangible or intangible system capable of working out outcomes or solutions despite individual objections to it.

To illustrate these two operationalizations of the epistemological concepts of situatedness and practice, I draw on two examples: confession and anthropology of disasters. The case of confession helps us understand when an apparatus is in place or not; by confessing a sin to a friend, just a friendly bond is reinforced. Instead, by confessing a sin to a religious officer, an apparatus is set in motion to restore an individual's inclusion in a religion-oriented society that values confessions as acts of repentance. The 'technique,' in this example, is the same, but what changes is the outcome of its deployment. The second example, which I will not examine here in detail, is that of natural disasters: the anthropology of natural disasters helps us set the limits of human negotiability and collective action and reveals that coping mechanisms are not always embedded in a community's heritage. This latter example suggests that communal negotiability is given an upper and lower cap: community action comes into play when supra-individual resources are needed, but the demand of resources cannot be too high, on pain of tearing apart the very social fabric of the community.

### *1.2.2. Pilot study*

After having clarified what I mean by 'negotiability' and 'apparatus,' I show how such concepts could be understood in a real case scenario. I thus turn myself to the ethnographic studies of Neilson et al., which have been undertaken in the Azores Islands, that is, the same region where I did my fieldwork. The resulting section is a reinterpretation of Neilson et al.'s results, especially in light of the negotiability continuum. The practice of picking *lapas* (a type of molluscs) is examined as a heritage practice that bear close ties with the educational experience of the Azores island communities. My reinterpretation of Neilson et al. shows that the same practice—or, should I say, technique—that is, the picking of *lapas* from the shores

and cliffs of the Azores, had different educational outcomes depending on the environmental and societal context. It is thus shown that, in the past, *lapas* and the sea were seen as a source of wealth but also of mysterious threats, and that *lapas* were embedded in an economy of subsistence. Some parents would teach their children how to pick them, whereas others would ban their children from trying for fear the sea could swallow them by the rocky cliffs where *lapas* usually make their colonies. In contemporary times, however, the sea is seen as a depleted resource and *lapas* make a comeback not in family life, but in schools (formal setting) as a ploy to teach children about the vulnerability of the environment facing human action. The pilot study concludes with a cross examination of the past versus present scenarios: different time, different apparatuses at play, different educational outcomes, different values being implemented.

After capitalizing on the success of the pilot study, which still relied mostly on desk research *Chapter 3* ends with a review of the materials and methods concerning the main study, which is pivotal to the current research project and unfolds in *Chapters 4, 5, 6* and *7*—thus constituting, together with the theoretical inquiry of *Chapter 1*, the main bulk of the thesis.

This latter methodological section opens by reflecting on an excerpt of my fieldwork journal in which I pondered about my positioning within ecopedagogy as an anthropologist of education. After such act of self-awareness, I begin to describe the circumstances that set in motion the entire research project. Namely, a fortuitous encounter with Francisco Sousa, Professor at the University of the Azores, gave me the opportunity to visit Terceira Island during its 2020 Carnival.

Such Carnival appeared to me and to my collaborator and other senior Department members as a singularity in the European context—both because of its inherent folkloric structure and because the Azores, where Terceira Island is located, are one of Europe's Outermost Regions. Additionally, in light of my quest for non-orthodox contributions to education drawn on

cultural heritage, Terceira's Carnival appeared to be a particularly fruitful object of inquiry. As I explain in *Chapter 3*, at the time I had no idea the Sars-CoV-2 pandemic outbreak would disrupt most of my planned fieldwork trips and travel arrangements. Therefore, much of the chapter is dedicated to illustrating as a first-person account how I reworked my methodology to fit the international circumstances. Finally, my methodology emerges as a series of layered actions that constitute different iterations of the same investigative effort.

### *1.2.3. Step A: Rapid Assessment and desk research*

First, there is a Rapid Assessment of Terceira's Carnival. Drawing on Ellsberg and Heise, as well as Handwerker, I show that Rapid Assessments are possibly the only way for a single researcher to tackle a chronologically condensed event such as a Carnival or a feast. In addition to the 2020 Rapid Assessment, I undertook historical and documentary research, and ended up with a wealth of explorative interviews, fieldwork journal entries, and a personal archive of documents and audiovisual materials. These are: 38 primary sources (7 self-printed booklets, 14 folk collections of Carnival *danças* [dances] and *bailinhos* [satires featuring music, dancing, and acting], 17 newspaper and magazine articles dating 1931–2020; to these, I added the Rapid Assessment efforts: 10 hours of stay with the members of Bailinho dos Rapazes das Doze Ribeiras, on and off stage, 41 hours of presence in local theatres.

### *1.2.4. Step B: participatory action research*

Second, there is a participatory activity. Owing to the fact that Sars-CoV-2 restrictions entailed the cancellation of Terceira's Carnival in both 2021 and 2022, I accepted to collaborate with some Azorean Professors on a scholarly article concerning this peculiar cultural heritage phenomenon. This was fortuitous but essential to the current research project, because it provided to me a viable substitute for what Handwerker considers the need to recruit local assistants during ethnographic research. Such a situation is methodologically

sound and was also described by Hagberg and Körling in a paper concerning ‘inaccessible fields.’ The only difference is that, in my case, power roles were reversed: I was the postgraduate student and all other team members were my seniors. Rather than being a drawback, this ensured the achievement of several methodological goals: I could not act as a hegemon to silence the voice of assisting natives; the participation of an Azorean from another island would contribute to data validation and defuse native attempts to control the narrative; my research would have an output that matched the goals of the collaborating team of natives; finally, the entire activity would be participatory in the broadest sense of the word. Naturally, as Oliver de Sardán remarks, the type of collaborators we join forces with changes our positioning in the field. This case was no exception, so I openly embraced this form of *enclícase* [enshrinement] and used it to my own advantage—it even features in one of the explanatory concepts included in *Chapter 5*: “folk elites.”

#### *1.2.5. Step C: further fieldwork, non-structured biographical interviews, and native validation*

The third step resulted from the possibility to travel again to the Azores. I packed my things and set out to collect more data and carry out at least two other Rapid Assessments. However, as the participatory project kept evolving, it became clear that my next fieldwork attempts could serve as means to collect further data that could either validate or refute what was being produced by the team I was leading.

The outcome of this stage is a thematic analysis based on the materials of 11 non-structured interviews with what Handwerker calls ‘cultural experts:’ 3 secondary school teachers (2 males, 1 female), 4 folklore experts (3 males, 1 female), 1 social worker (1 female), 1 music teacher (1 male).

### **1.3. Desk research**

Desk research takes place in *Chapter 4* and *Chapter 5*. However, in the writing of the current dissertation, I made broad use of other testimonies as well, and have revised these chapters should fieldwork data reveal something relevant.

#### *1.3.1. Geography of Azores*

*Chapter 4* aims to offer a general outlook of the Azores Autonomous Region and Terceira Island. The emerging picture is that of one of Europe's Outermost Regions, comparable to a Small Island State, which experiences demographical, education, and economical challenges mostly because of the costs it faces to deliver basic services to its population. However, despite the existence of such challenges, it appears that the vulnerability of the Azores Islands has been inflated by the dominant narrative. I consider the history of this archipelago, its geopolitical relevance, and the existence of a lively discourse on Azorean identity. To give a taste of the thriving and desecrating attitude of its people, I analyse the case of how the local Air Carrier plays a role in the commodification of the Azorean heritage, and yet its efforts are systematically defused by the Azoreans.

#### *1.3.2. Geography of Terceira Island*

Subsequently, the focus shifts on Terceira Island, its idiographic singularity, and its overall features. Terceira is the core of my fieldwork activities. I analyse the island through the lenses of Dicken's geographical framework, which stresses on three dimensions: globalizing processes, internationalizing processes, and localizing processes. To illustrate how these three processes intersect the life of Terceira Island, I draw on the case of the Lajes Air Base. This Portuguese-American Air Base has dominated the life of Terceiran people for the past seven decades and resulted in the unfolding of the processes Dicken speaks about: the United States presence is a globalist strength, and the people of Terceira mostly experienced it in an

internationalization point of view. That is, they kept receiving external inputs without the ability to control the narrative concerning the island.

This was nonetheless useful and had a valuable educational impact on the island. For example, media outlets were introduced, new sports, and a different conception of lifestyle. Additionally, I reconstruct the biography of an American teacher who left her footprint in Terceira by professionalising one of the island's Philharmonic Society, which, in later years, would constitute an example for others to follow.

Finally, I address localizing processes in Terceira Island by showing how the presence of the Air Base fostered the growth of entrepreneurial activities dedicated to catering for the military personnel of the base and their families. Such initiative is also mirrored in the literary production of the island, which I take into account to re-address the issue of how vulnerability might have been inflated or downplayed.

### *1.3.3. Women in Terceira's mythology*

The subsequent *Chapter 5* complements desk research by examining the role of women in Terceira's literary output in light of the legends surrounding the Sixteenth-Century Battle of Salga.

After clarifying some points concerning the state of the art of historical research, I introduce the character of Brianda Pereira, whose legend dominates Terceira's tales of resistance from foreign oppressors. After having addressed primary sources, I proceed to discuss the way the intellectuals of Terceira have manipulated female characters in order to promote their political agenda or ideological goals.

Subsequently, I deepen the research on the usage of the character of Brianda by comparing an instance of immaterial heritage and a contemporary commodification of the legend: that is, a Carnival dance of 1954 about the Battle of Salga and a beer label of 2018 displaying the same



character in a romanticized way. *Chapter 5* ends with a reflection on how tales of resistance matter in the construction of Azorean identity.

#### **1.4. Fieldwork and participatory research**

*Chapter 6* is entirely dedicated to the results of fieldwork research as they appear in the participatory scholarly output, which was unexpectedly published by the *Sustainability* few days before my thesis submission. At the time of writing, *Sustainability* is ranked top83 in the Scopus World Index for the area of Social Sciences.

##### *1.4.1. Participatory output*

The first part of *Chapter 6* is wholly dedicated to the participatory output. It is introduced by a discussion on the organization of the team of scholars (I was the only one to carry out empirical investigation) and of the challenges faced during the organization of the team's working schedule.

A further section on 'materials and methods' is introduced, to account only for my preparatory research and my early Rapid Appraisal. A discussion on the international outlook of Terceira's Carnival follows, as requested by the Azorean members of the research team. Their conviction is that heritagization procedures could jeopardize the possibilities for Terceira's Carnival to rise to prominence as other continental carnivals did.

Subsequently, the history of Terceira's Carnival is reconstructed, drawing on primary and secondary sources. The emerging picture is that of a rural practice that got increasingly urbanized over the course of the Twentieth Century. Originally unfolding in the streets, it gradually became enshrined in the theatres [*salões*] built by each of the local administrative divisions [*freguesias*] of the Island.

The paper then proceeds to evaluate some theories concerning Carnival. It finds that Heers' view is too politicized, Kezich's is excessively rooted on the epistemological assumption that

current European folklore could be explained by the distant past. Eventually, we side with Duarte in recognizing the multi-modal nature of Terceira's Carnival.

The ethnographic description of the Carnival follows, with sections dedicated to its singular taxonomy, its extended pervasiveness, and its community structure. It is then shown, thanks to both desk and fieldwork research, that the Carnival of Terceira impacted the community by fostering the birth of a 'folk elite,' which is allied with the cultural interests of the people and, as such, nurtures the activation of spaces where creativity and critical thinking can take place. In turn, the paper shows that such multi-layered alliance benefits Azorean identity by making its Carnival a permanent identity workshop.

#### *1.4.2. Thematic analysis*

The participatory output is followed in *Chapter 6* by a thematic analysis. Such analysis bears on some of the main themes addressed by the participatory output and hermeneutically rewrites them in light of what emerged in the non-structured interviews that were carried out during the last stage of my fieldwork. The transcripts of these eleven interviews are made available in *Appendix A*, whereas *Appendix B* includes fieldwork notes that bear relevance to the issues I address in this dissertation (including a further thematic concerning the contradictions of Terceira's bullfights, for which there was no room in the main body of the thesis).

Thematic analysis draws again on the previously established concepts of communities of practice, negotiation, and apparatus. Two main moments of Terceira's Carnival are identified, which constitute the backbone of my narrative on peripheral participation. On the one hand, I show how Carnival, by leaving the streets, has created a new series of ways to innovatively manage heritage physical space in order to make room for different levels of engagement. On the other hand, I show how Terceira's Carnival fosters novel ways of community engagement

by virtue of its structure. In doing so, it enables participants to self-regulate their level of engagement and, as such, it achieves the goal of creating an inclusive community of practitioners who share knowledge and know-how without tying the sharing to the attainment of specific statuses among the community. That is positive because, notwithstanding the asymmetry between experts and learners, to function properly communities that allow for peripheral participation should take care of sub-standard performing members.

At this stage I also address the case of Projeto MUTE of the Primary School of Biscoitos (a *freguesia* in Northern Terceira Island). Projecto MUTE is an approach by a formal educational institution to keep up the spread of a genre of tambourine dance [*dança de pandeiro*], which, differently from other Carnival-related practices, was suffering a decline. In fact, such decline was caused by attitudes of corporatism and sectarianism on behalf of its practitioners, which is the opposite of what Carnival is now. Thanks to the efforts of music teachers and families, an opportunity was offered for students to participate in the creation of a *dança*. The project has been successful and has performed on stage for the past 10 years and has involved up to 108 children.

Once established how the apparatus of Carnival fosters peripheral participation, my thematic analysis proceeds to examine what type of negotiations take place *through* such apparatus. That is another direct application of my earlier methodological framework.

What emerges is that Carnival was used to negotiate different things under different historical contingencies. In its earliest days, it was an instrument to negotiate the role of rural islanders facing global phenomena they had little control over. Afterwards, during the Twentieth-Century *Estado Novo* dictatorship, Carnival associationism became an instrument of political emancipation, although it never rose to prominence as a subversive movement. Rather Carnival dances kept up criticism of the regime notwithstanding reiterated censorship attempts. Eventually, Carnival has become an instrument to negotiate gender role on the

island. In the end, I show how Terceira’s Carnival constitutes an apparatus that function as a permanent workshop of collective identity: although it is not qualifiable as a total social phenomenon, its participants are able to renegotiate their identity through what appears like a *simulation of a total social phenomenon*.

### 1.5. Achievements

Research level	Outcomes
Epistemology	<ul style="list-style-type: none"> <li>• Review of Dib’s distinction between formal, non-formal, and informal education</li> <li>• Rejection of Strauss’ mentalistic account of education in light of intentionality</li> <li>• Rejection of Bronfenbrenner and Evans’ bioecological developmental model because of its inability to tackle culture as a medium</li> <li>• Re-evaluation of Lave and Wenger’s ‘communities of practice’ in light of Ovando’s updates</li> <li>• Adoption of the <i>Greater Humanities</i> manifesto for education science</li> <li>• Simplification of the Greater Humanities manifesto by conflating its four main tenets into two operationalizable concepts: situatedness and practice</li> <li>• Adoption of ecopedagogy as a paradigm, evaluation of its merits</li> <li>• Revision of ecopedagogy in light of Misiaszek’s account, for better empirical implementation</li> <li>• Identification of cultural heritage as one of the possible key targets of Misiaszek’s ecopedagogical investigative framework</li> <li>• Identification of cultural heritage as a problematic notion, owing to its intertwining with power games</li> <li>• Adoption of a genealogical investigative disposition to foster positive heuristics concerning imbalances of power in educational settings supported by heritage</li> <li>• Production of a working example of genealogy, with direct reference to the history of education in the country where fieldwork took place</li> </ul>
Methodology	<ul style="list-style-type: none"> <li>• Clarification of the criteria to identify communities of practice</li> <li>• Operationalization of situatedness through the appreciation of the negotiability continuum</li> <li>• Operationalization of practice through the appreciation of apparatus complexity</li> <li>• Evaluation of the issues concerning the concept of ‘apparatus.’ Default of the complexity continuum to a binary qualitative variable</li> <li>• Specification of Misiaszek’s ecopedagogical research principles</li> <li>• Validation of the above entries through a pilot investigation</li> <li>• Development of a quasi-ethnographical method divided in three steps: <ul style="list-style-type: none"> <li>○ Early Rapid Appraisal and desk research</li> <li>○ Participatory production of a scholarly article with a team of natives</li> <li>○ Review of the participatory outcome in light of further fieldwork research entailing 11 non-structured interviews with ‘culture experts’</li> </ul> </li> <li>• Adoption of the concept of <i>enclitage</i> as a guiding interpretive concept for subsequent interpretation</li> </ul>
Pilot study	<ul style="list-style-type: none"> <li>• Validation of the methodological and epistemological categories that triggered</li> </ul>

	<p>the pilot study</p> <ul style="list-style-type: none"> <li>• Identification of picking <i>lapas</i> as the cultural heritage of the Azores</li> <li>• Comparative analysis of how picking <i>lapas</i> played different educational roles for Azorean communities depending on social and environmental contingencies</li> </ul>
Desk research	<ul style="list-style-type: none"> <li>• Identification of how Terceiran people negotiate their relationship with commodifying forces</li> <li>• Revision of the stereotype of vulnerability concerning the Azores archipelago</li> <li>• Demonstration that Dicken’s framework for globalization applies to Terceira Island</li> <li>• Reconstruction of the biography of Miss Zabilka, an American teacher who left a footprint in the history of education in Terceira</li> <li>• Correction of historical inaccuracies surrounding the myth of the Sixteenth-Century Battle of Salga (legend of Brianda Pereira)</li> <li>• Interpretive evaluation of how Azorean intellectuals exploited narratives concerning women to advance their ideological goals</li> <li>• Comparison between an instance of heritage and an instance of commodification concerning the legend of Brianda Pereira</li> <li>• De-mythization of the idea of Terceira Island as an island of warriors</li> </ul>
Participatory research (includes outcomes from early fieldwork appraisals)	<ul style="list-style-type: none"> <li>• Placement of Carnival against the background of international heritagization processes</li> <li>• Reconstruction of the history of Carnival</li> <li>• Revision of Heers’ theory concerning Carnivals</li> <li>• Demonstration that Kezich’s theory cannot apply to Terceira’s Carnival</li> <li>• Ethnographic description of Terceira’s Carnival, with focus on its idiographic dimension, its taxonomy and vocabulary, its pervasiveness, and its structure</li> <li>• Interpretation of Terceira’s Carnival in light of the concept of ‘folk elites’</li> <li>• Demonstration that Terceira’s Carnival enjoys a sustainable dimension</li> <li>• Rebuttal of Hilbers’ and Turner’s theory as long as Terceira’s Carnival is involved</li> </ul>
Thematic analysis (includes results from interviews and other fieldwork data)	<ul style="list-style-type: none"> <li>• Hermeneutics of how contemporary Terceira’s Carnival manages spaces in order to foster peripheral participation</li> <li>• Hermeneutics of how the structure of Carnival fosters participation at different levels, including audience, active participants</li> <li>• Discovery of a class of folk critiques and <i>connoisseurs</i> of Terceira’s Carnival</li> <li>• Identification of four levels of negotiability related to Terceira’s Carnival according to historical contingencies <ul style="list-style-type: none"> <li>○ Negotiation of marginalization</li> <li>○ Negotiation of political freedom</li> <li>○ Negotiation of gender</li> <li>○ Negotiation of political identity</li> </ul> </li> <li>• Formulation of a theory concerning Terceira’s Carnival: a permanent identity workshop based on the simulation of a total social phenomenon</li> </ul>
Profession	<ul style="list-style-type: none"> <li>• Co-direction of an international research team</li> <li>• Publication of the first major English-language work on the examined cultural phenomenon</li> <li>• Achievement of a publication in a top-ranking journal</li> </ul>

Table 1: Achievements of the research presented in this dissertation.

## 2. Epistemological categories

### 2.1. Genealogical prelude: formal, non-formal, and informal education

#### 2.1.1. *Education and pedagogies: an unwarranted confusion?*

Early occurrences of the formal/non-formal distinction occasionally blur the line between a neutral appreciation of educational processes and value judgements. For example, Dib, presenting a paper to the American Institute of Physics in 1988, did not just distinguish between formal and non-formal, but addressed “formal education” as “presential education,” with an “expositive” methodology “scarcely relating to the behavioural objectives,” and with “punitive” assessments with little regard to “students’ standards, values and attitudes.”<sup>1</sup>

Instead, non-formal education is equated with indirect teaching methods, distance learning, students’ autonomy, and “flexible curricula;”<sup>2</sup> among its techniques, Dib lists: “correspondence learning[, ] distance learning[, and] open systems.”<sup>3</sup>

To the above two categories, Dib adds “informal education,” which he defines as opportunities of learning with little controlled results, lack of official curricula, and contingent nature of the educational process; however, he maintains that informal education is always derived from an original educational intention, except that it is disseminated *as is*, in an uncontrolled way:

“Informal education for instance comprises the following activities: (a) visits to museums or to scientific and other fairs and exhibits, etc.; (b) - listening to radio broadcasting or watching TV programmes on educational or scientific themes; (c) - reading texts on sciences, education, technology, etc. in journals and magazines; (d) - participating in scientific contests, etc.; (e) attending lectures and conferences. There

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<sup>1</sup> C. Z. Dib, ‘Formal, Non-Formal and Informal Education: Concepts/Applicability’, in *AIP Conference Proceedings*, vol. 173 (AIP Conference Proceedings Volume 173, AIP, 1988), 300–301, <https://doi.org/10.1063/1.37526>.

<sup>2</sup> Dib, 301.

<sup>3</sup> Dib, 302–306.

are many instances of situations/activities encompassed by informal education, from those that may take place in the students' homes - such as scientific or didactic games, manipulation of kits, experiments, reading sessions (biographies, scientific news, etc.) - to institutional activities - lectures in institutions, visiting museums, etc.”<sup>4</sup>

Dib's conceptualization appears to be caught up in a conundrum, which we could unfold through a metaphor. Imagine the only government you saw until today was a dictatorship, to the point the meaning you attach to the word 'government' is a description of the dictatorial and monocratic methods used in your country. After moving abroad, you would be surprised to see people voting in a democracy and you would be reluctant to call what they do 'a government.' In your eyes, what they are doing is all *but* government. Upon returning to your own country of origin, you might start a movement to revolutionize it and call for a transition from 'government' to 'non-government'—while, in fact, by the expression 'non-government' you mean 'democracy.'

This is similar to what occurred to Dib: his advocacy in favour of non-formal education does not derive by an attempt at providing a universal, quasi-nomothetic classification of what education is, but is rather influenced by his personal perspective, which is dominated by historical contingencies. Yet Dib seems partly aware of the shortcomings of his assumed classification, since some pages later he argues that it is not the method of teaching *per se* that qualifies an educational process as formal, non-formal, or informal, but rather its integration within given sets of rules:

“It is easy to see that the higher the degree of systematization and organization involved in informal education activities, the near er it will be to non-formal education. This is a relevant fact inasmuch as it suggests the possibility of transition from informal to non-formal. We must ponder that, considered by itself, we cannot generally assert whether an educative action belongs to the formal, to the non-formal or to the informal universe. For instance, a visit to a Science Museum may be an informal education instance if arising from a personal and spontaneous [*sic*] decision by a student, as it is not directly related to his scholastic activities. However, if such a

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<sup>4</sup> Dib, 307.

visit is part of an established curriculum, requiring from students a written report and including assessments by the teacher, or tutor, then it will probably be an activity associated to either the formal or to the non-formal education.”<sup>5</sup>

These semantic shifts could be understood in light of Dib’s subsequent proposal, which aims at integrating non-formal elements in formal education institutions by changing the way education is delivered *in practice*.<sup>6</sup> Additionally, it is justified by the great paradigm shift from a *magistrocentric* (teacher-centred) to a *puerocentric* (pupil-centred) view of education. Paradigm shifts entail both changes in theories and practices. This means that paradigm shifts are hardly theoretical-only in nature and require new *technologies* and *ways of doing*. For example, in medicine, the paradigm shift that was dogmatized through Koch’s postulates would have been impossible without the usage of lenses—invented by Antonie van Leeuwenhoek “200 years earlier.”<sup>7</sup> Additionally, it would not have been possible without the development of epidemiology by the likes of Ignaz Semmelweis and John Snow, which resulted from attempts to respond to societal changes: namely, the creation of hospitals and of the concurrent clinical medical practice, as well as the epidemiological challenges posed by fast-paced urbanization.<sup>8</sup> Finally, Miles Berkeley’s discovery of the fungal aetiology of the “Irish potato blight” and Pasteur’s debunking of the “theory of spontaneous generation” polished off the cornerstone of microbiology.<sup>9</sup>

In light of the above example on the birth of microbiology, Dib’s overlapping of formal education and specific pedagogies appears not just reasonable, but fully warranted by the fact education became a science only in the Twentieth Century. Genealogically speaking, the

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<sup>5</sup> Dib, 307.

<sup>6</sup> Dib, 309–314.

<sup>7</sup> Andrew W. Artenstein, ‘The Discovery of Viruses: Advancing Science and Medicine by Challenging Dogma’, *International Journal of Infectious Diseases* 16, no. 7 (July 2012): e470, <https://doi.org/10.1016/j.ijid.2012.03.005>.

<sup>8</sup> Artenstein, e470.

<sup>9</sup> Artenstein, e470.



development of education as a science is intertwined with the societal changes that involved the emergence of mass society, which I will describe in the following section in light of European industrialization.

### *2.1.2. The emergence of formal education*

Owing to colonialism and the development of the private industry sectors, governments gradually extended their hegemony over various aspects of society that were not originally covered by the previous governmental paradigm. This was not a novelty *per se*, inasmuch even ancient policies had their own taxonomies; however, historical analysis shows that seemingly identical concepts were understood much differently by cultures of other times and historical periods. For example, Akinfieva and Vorontsov remark that Ulpian's (c. 170–223 A.D.) notion of “public law” was in fact limited to “the action of priests and the positions of magistrates,” whereas “private law” is, for him, a blend of “natural law, people's law, and civil law.”<sup>10</sup> The distinction is even more striking if we consider how sacralised the law was in ancient European societies, compared to current attitudes.<sup>11</sup> Along came European nation-states, which began as ‘natural organizations’—in the sense of the phrase coined by Habermas:

“Certain kinds of institution, such as dynastic clans and banking houses, empires and urban communes, churches, academies, and business firms, cannot be fully explained in functional terms, that is, in terms of their organizational structure. Such institutions also secure collective bonds and loyalties by means of symbolic modes of expression and ceremonial practices. In comparison with everyday, rationally comprehensible forms of behavioral coordination and control, these appellative and ritualistic forms preserve a non-discursive affective and imaginary core. We can distinguish such

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<sup>10</sup> V. V. Akinfieva and S. G. Vorontsov, ‘Public, Private, Civil Law, and Jus Civile: Content of the Concepts in Ancient Roman and Modern Doctrinal Sources’, *Вестник Пермского университета. Юридические науки*, no. 48 (2020): 242, <https://doi.org/10.17072/1995-4190-2020-48-226-247>.

<sup>11</sup> Akinfieva and Vorontsov, 242.

“strong” institutions – which have, however, become progressively weaker in modern times – from mere organizations by their appearance of ‘naturalness’.”<sup>12</sup>

As private entrepreneurship flourished in Europe and in the Colonies, challenges to monocratic powers grew in number. Moreover, thanks to the scientific revolution and the dissemination of printed books, the educated public became increasingly aware of alternatives to the *status quo*: Renaissance anthropocentrism, paired with scientific advances, critical interpretations of religious morality (*viz.* Reformation), and nostalgia for the idealized Roman Republic of yore conflated in a new political sensitivity, which increasingly saw the State as a provider of goods (either material or immaterial) rather than as the emanation of hegemon dynasties controlling vast territories and resources.

Such phenomenon could be witnessed in the early Seventeenth Century. For example, Sir Edward Coke promoted the expansion of the prerogatives of Common Law at the expense of Civil Law: the former was mostly intertwined with trade law, or *lex mercatoria*, whereas the latter was a monarchic interpretation of the old Roman law, which equated public interest with the exercise of royal privileges.<sup>13</sup>

The attribution of further powers to the State follows the same trend: attention shifted from the good of the sovereigns to the good of the nation, understood as a commonwealth of people. In turn, the ‘good’ was increasingly understood as a matter of applied reason, which entailed conceiving reasonable practices and engineering solutions to widespread societal issues. This paved the way for the Age of Revolutions, which among their main objectives, listed the abolishment of aristocratic privileges and the enactment of social reforms.

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<sup>12</sup> Jürgen Habermas, *Time of Transitions*, ed. Ciaran Cronin and Max Pensky (Cambridge, UK ; Malden, MA: Polity, 2006), 53.

<sup>13</sup> Martti Koskenniemi, ‘Sovereignty, Property and Empire: Early Modern English Contexts’, *Theoretical Inquiries in Law* 18, no. 2 (26 January 2017): 357–361, <https://doi.org/10.1515/til-2017-0017>.

However, as explained by Foucault, at the beginning of such revolutions, the public good was still understood in terms of benefit to the rampant bourgeoisie. For example, in Eighteenth Century France, the creation of institutions that would gather convicts, prostitutes, or mentally ill people was more a result of the widely accepted need to ‘clean the streets’ than of scientific medical or judicial concerns. Modern European, as well as Enlightenment thinkers revelled the opportunity of engineering society by controlling the bodies of non-conforming people, and the structural efficiency of prisons soon became the leading paradigm behind the creation of ‘welfare’ institutions—such as asylums. In the meantime, sovereigns sought means to preserve their authority over their increasingly unruly subjects.

Notwithstanding pressure to normalize schooling, the choice between enrolling in a school or college or hiring a domestic tutor remained the prerogative of individual families. For example, in England educational choices were mostly a private matter and private colleges became progressively unpopular.

“For Locke, ‘private’ clearly refers to a domestic education and ‘public’ to education in a grammar or a ‘great school’, the meanings of ‘private’ and ‘public’ in the eighteenth century were ambiguous enough for some commentators to feel the need to clarify their terms. ‘By private, I mean only domestic and solitary education’, noted Vicesimus Knox in a footnote at the start of a chapter on the debate in his *Liberal Education*. ‘Private’ could also refer to a variety of small seminaries, though these could also be called ‘public’ to distinguish them from domestic education. ‘Public’ was always used with reference to grammar and great schools.”<sup>14</sup>

If John Locke (1632–1704) sided with domestic education, citing the incompetence of teachers and the risks involved in sending boys to boarding schools where they would be subject to abuse, Vicesimus Knox (1752–1821) began fighting to reform public schools in the

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<sup>14</sup> Michèle Cohen, ‘Gender and the Private/Public Debate on Education in the Long Eighteenth Century’, in *Public or Private Education?: Lessons from History*, ed. Richard Aldrich (Hoboken: Taylor and Francis, 2012), 2, <http://site.ebrary.com/id/10093906>.

1780s, in order to restore their utility and reputation.<sup>15</sup> He saw public schools as an anticipation of future society, and thus better suited to train children to deal with others.<sup>16</sup>

According to Cohen, Knox epitomizes the programmatic attitude of the bourgeois society of the 1780s and later decades, which aimed not just at training skills through good schooling, but also at forming new men and, as such, reforming the entire society.<sup>17</sup> The solution, for Knox, was discipline and the classics: the former, by virtue of the school's organization; the latter, because of the alleged inherent value of their content.<sup>18</sup> Here, paternalism is matched by patriarchy, inasmuch the belief that schools would benefit pupils was only predicated of boys: accordingly, whereas males would learn to become men by enduring the hardships and reaping the benefits of group dynamics among peers,<sup>19</sup> females were destined to the same treatment as mentally challenged people.<sup>20</sup>

While England was struggling with the idea of public schooling (that is, the education of classes of peers instead of domestic tutoring), other countries made schooling one of the tactical goals of their political investments, whose strategic aim was the achievement of full centralization.

In his detailed study on the early development of compulsory schooling in Prussia and Austria—which introduced compulsory schooling in the 1760s and 1770s—Melton lists all the factors that contributed to this political shift: the influx of the Reformation, which

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<sup>15</sup> Cohen, 4–5.

<sup>16</sup> Cohen, 5.

<sup>17</sup> Cohen, 6.

<sup>18</sup> Cohen, 6.

<sup>19</sup> Cohen, 8–11.

<sup>20</sup> Cohen, 7.

attempted to provide all believers with the tools to interpret religious texts on their own;<sup>21</sup> the spread of Pietist pedagogy and its appropriation on behalf of Catholic reformers;<sup>22</sup> the social philosophy backing Prussian Cameralism [*Kameralismus*], whose centralized and bureaucratic view of the State was paired with a desire to improve the nation in all aspects of life;<sup>23</sup> the attempt to make up for the loss “seigniority” by introducing compulsory activities in the early childhood that would harness the rebellious character of untamed commoners.<sup>24</sup> In this respect, the advent of public education was the mixed result of private investment, statism, and philanthropic paternalism.

Private investment in schooling is the consequence of the emerging middle class and increased standards of living.<sup>25</sup> Surplus wealth from investments or a well-managed trade in a booming economy prompted families to seek learning opportunities for their offspring.<sup>26</sup> This triggered the development of private institutions that provided educational services or the repurposing of religious schools.

Statism came into play when the increasingly complex systems of administrative governance began requiring a great number of sufficiently prepared public officers and functionaries. Prussia and Austria pioneered such approach, respectively, with the decrees of Frederick the Great (1763, 1765) and the edict of Maria Theresa of Austria (1774).<sup>27</sup> For example, Johann

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<sup>21</sup> James Van Horn Melton, *Absolutism and the Eighteenth-Century Origins of Compulsory Schooling in Prussia and Austria*, First paperback edition (Cambridge New York New Rochelle Melbourne Sydney: Cambridge University Press, 2002), 3–21.

<sup>22</sup> Melton, 23–58, 91–97.

<sup>23</sup> Melton, 109–144.

<sup>24</sup> Melton, 145–167.

<sup>25</sup> Irene Q. Brown, ‘Philippe Aries on Education and Society in Seventeenth- and Eighteenth-Century France’, *History of Education Quarterly* 7, no. 3 (1967): 364, <https://doi.org/10.2307/367178>.

<sup>26</sup> Brown, 364.

<sup>27</sup> Melton, *Absolutism and the Eighteenth-Century Origins of Compulsory Schooling in Prussia and Austria*, xiv.

Ignaz Felbiger (1724–1788), a pedagogist from Schleswig and minister of Prussia, enacted reforms in order to make students useful to the nation-building process and recommended their competences be good assets for the State.<sup>28</sup> France, which boasted its own local schools managed by the Church under the spin of the skills demand on behalf of the absolutist bureaucracy,<sup>29</sup> increased the formalization of its education system first with the French Revolution, and then with reforms of the Napoleonic time concerning the *écoles centrales*, the *Université Impériale*, the *École Polytechnique* (1794) and the *lycées* (1802). On the one hand, the Revolution promoted free speech and debate: in 1792, Nicolas de Condorcet (1743–1794) proposed a reform in this sense,<sup>30</sup> which would be enacted only after his death.<sup>31</sup> On the other hand, the Napoleonic mindset promoted a shift towards nationalism and was aimed at building “a technical élite.”<sup>32</sup> This is hardly mass schooling, inasmuch in 1809 the global school attendance ratio was only 1.8 out 1,000 people.<sup>33</sup> In fact, the country tackled public schooling only in 1833, with the *Loi Guizot*, whose enactment consolidated primary schooling and the freedom of teachers.<sup>34</sup> Later, in 1850, Falloux would extend the same

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<sup>28</sup> Ulrich Binder, ‘State Official – Public Official – Pedagogic Official Development of the Teaching Profession in Austria, France and Germany in the 18th Century’, *Review of European Studies* 1, no. 2 (1 December 2009): 77–78, <https://doi.org/10.5539/res.v1n2p76>.

<sup>29</sup> René Grevet, *L'avènement de l'école contemporaine en France (1789-1835): laïcisation et confessionnalisation de la culture scolaire* (Villeneuve d'Ascq: Presses universitaires du Septentrion, 2020), 8–9.

<sup>30</sup> Binder, ‘State Official – Public Official – Pedagogic Official Development of the Teaching Profession in Austria, France and Germany in the 18th Century’, 78–79; See also: Haydn Mason, ‘Universal Education: Condorcet (1743–94)’, in *French Writers and Their Society 1715–1800*, by Haydn Mason (London: Palgrave Macmillan UK, 1982), 212, [https://doi.org/10.1007/978-1-349-04660-7\\_14](https://doi.org/10.1007/978-1-349-04660-7_14).

<sup>31</sup> Mason, ‘Universal Education’, 217.

<sup>32</sup> William K. Cummings, *The Institutions of Education: A Comparative Study of Educational Development in the Six Core Nations*, Oxford Studies in Comparative Education, 12,2 (Oxford: Symposium Books, 2003), 37; See also: Cummings, 40, 81.

<sup>33</sup> Shabnam Aminmadani, *L'Illettrisme en France* (Paris: Printemps, 1998), 16, <https://ir.vanderbilt.edu/bitstream/handle/1803/2620/Aminmadani.pdf>.

<sup>34</sup> Aminmadani, 16–17.

principles to secondary schooling, with the additional introduction of welfare measures to enable the attendance of students from low-income families.<sup>35</sup>

The emerging picture is that of a close relationship between education and power. Additionally, it could be argued that the introduction of public education systems in Europe goes hand in hand with the exercise of absolutist powers and the attempt to promote participation to programmes of nation-building. In this sense, notwithstanding pedagogical and scientific advancements, formal education systems appear to be first and foremostly the *longa manus* of power structures that do not deal with individuals as goals in themselves. In such scenario, education *begins* with the State—for instance, through the issuing of educational policies—and *ends* with the State, which is the ultimate beneficiary of educational outcomes. When education benefits all, it is in a trickle-down fashion, but the logic remains unaltered: individual benefits pass through the advancement of the Nation as a communal endeavour—except that most implementing countries did not outline their education systems in terms of sheer collectivism but tailored them upon the perceived needs of already-existing governmental structures.

The case of Condorcet and Revolutionary France is an exception to such trend, inasmuch Condorcet's jusnaturalistic approach prompted the proposal of reforms that would provide citizens with the tools for their own self-accomplishment. A similar turn was taken by the later Falloux reform, which again preserved the idea of freedom of teaching, which reflects the consolidation of liberal ideals in Nineteenth Century France.

Subsequent developments of formal education moved in different directions but were nonetheless tainted by such original sin: the ideology of individual contribution to the common good. In its seminal formulation, such goal looks meritorious: formal education is

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<sup>35</sup> Aminmadani, 17.

the result of an investment made by the community *for* the community and, by extension, it benefits all individuals. However, historical contingencies made it so that education management and decision-making was, at best, the privilege of limited oligarchies—which expanded their base throughout the Nineteenth and Twentieth Century, but usually not enough to account for the entire population. Thus, more often than not, education policies were the expression of an élite and of its view of morals, society, and the future.

Soysal and Strang remark that, by World War I, all European countries had enacted not just public school laws, but actual mass education policies—which add the compulsory element to children schooling.<sup>36</sup> Soysal and Strang agree that the more centralized the hegemony, the easier it was to make such societal change: absolutist monarchies such as Eighteenth Century Austria and Prussia contrast with Great Britain, whose industrious middle class objected to the State’s monopolization of education.<sup>37</sup>

Soysal and Strang raise an issue concerning mass schooling: if its goals were directed by the élites, who would consciously or unconsciously manipulate policies to promote the *status quo*, how comes that most European mass education programmes leaned more towards general education and the humanities, rather than vocational education?<sup>38</sup>

In a sense, formal vocational education is a late comer in the scope of mass schooling.

Westerhuis observes this trend in Dutch Enlightenment:

“Vocational subjects were not seen as helpful for nation building; the homo economicus was not included in this concept of citizenship. Preparation for a working

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<sup>36</sup> Yasemin Nuhoglu Soysal and David Strang, ‘Construction of the First Mass Education Systems in Nineteenth-Century Europe’, *Sociology of Education* 62, no. 4 (October 1989): 277–278, <https://doi.org/10.2307/2112831>.

<sup>37</sup> Soysal and Strang, 278.

<sup>38</sup> Soysal and Strang, 279.



life was considered to be the proper concern of the workplace with its tradition of apprenticeships, as it had always been.”<sup>39</sup>

Seventeenth Century Dutch Republic enjoyed a capillary public education system, reaching primary enrolments rates of about 65% for children aged 4–8 years old.<sup>40</sup> However, aside from optional lectures in mathematics and astronomy, open to the wider public, vocational education was left to the devices of individuals, with no organized educational offer.<sup>41</sup> An exception to this was the Guild system, which however accepted apprentices in limited numbers, to preserve the secrets of the industry and ensure an oligarchic distribution of profits.<sup>42</sup> Such system, which was fragmented across different municipal councils, was scrapped after the fall of the Dutch Republic in 1795 owing to pro-Revolutionary turmoil.<sup>43</sup> As a result, power shifted from municipalities to the centralized authority of the State (1806), but again the concern for vocational education was sparse.<sup>44</sup>

When education reform came again to prominence in 1857–1863, State policies envisaged a segregated school for lower and upper classes and pushed the elitist idea that only few could attain the higher grades of education.<sup>45</sup> In such scenario, good citizens were equated with productive citizens.<sup>46</sup> However, even in such period, the organization of vocational education was left to private initiative.<sup>47</sup> Finally, starting with 1945, vocational education came under

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<sup>39</sup> Anneke Westerhuis, ‘The Role of the State in Vocational Education: A Political Analysis of the History of Vocational Education in the Netherlands’, in *Vocational Education: International Approaches, Developments and Systems*, ed. Linda Clarke and Christopher Winch (London ; New York: Routledge, 2007), 21.

<sup>40</sup> Westerhuis, 22.

<sup>41</sup> Westerhuis, 23.

<sup>42</sup> Westerhuis, 23.

<sup>43</sup> Westerhuis, 24.

<sup>44</sup> Westerhuis, 24.

<sup>45</sup> Westerhuis, 25.

<sup>46</sup> Westerhuis, 25.

<sup>47</sup> Westerhuis, 26–27.

the scrutiny of the public eye.<sup>48</sup> The main concern, then, was to use vocational schooling as a way to shield young workers from abuse, facilitate their mobility beyond “the narrow confines of their trade”.<sup>49</sup>

The example of the Netherlands corroborates Soysal and Strang’s concern about the ambivalent nature of mass schooling: on the one hand, it was paraded as subservient to nation-building and its own needs; on the other hand, it would provide pupils with little professional skills and was broadly concerned with general education.<sup>50</sup>

In their view, the issue is explained the competition between the State and the Church.<sup>51</sup> In fact, as long as Churches broadly overlapped with their countries, they were given ample privileges in terms of education management, to the point many countries did not change their school system until the alliance between the State and the Church was broken.<sup>52</sup> Through statistical analysis of historical events in fifteen European countries, Soysal and Strang demonstrate that the State’s relationship with the Church impacted the shift towards mass education, whereas the type of polity and economic factors had an insignificant effect: strong relationship with the Church (e.g. the existence of a national Church) would determine earlier onset of formal public education systems; concurrently, compulsory schooling laws are correlated with lower enrolments.<sup>53</sup> The ensuing historical typology is as follows:

- (a) “Statist construction of education” results from States enjoying strong alliance with their national Church; a public education system is started early and is preserved throughout the ages.<sup>54</sup>

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<sup>48</sup> Westerhuis, 27.

<sup>49</sup> Westerhuis, 29.

<sup>50</sup> Soysal and Strang, ‘Construction of the First Mass Education Systems in Nineteenth-Century Europe’, 278–279.

<sup>51</sup> Soysal and Strang, 279.

<sup>52</sup> Soysal and Strang, 279.

<sup>53</sup> Soysal and Strang, 285.

<sup>54</sup> Soysal and Strang, 285–286.

- (b) “Societal construction of education” occurs in countries where there is no national Church, or it has been disbanded; here, the emergence of a public education system is due to private initiative and, although it was eventually subject to organic legislation, this happened much later.<sup>55</sup>
- (c) “Rhetorical construction of education” defines the case of countries, like Italy and Greece, in which policymaking took place quite steadily, but without immediate *de facto* results; these countries had the ideas but not the power to implement them.<sup>56</sup>

In sum, according to Soysal and Strang, mass schooling followed two separate pathways: one is that of the total control, which results from harmony between the high spheres of Church and the State, and the other one is that of private competition, which States struggle to regulate given the number of demands and dissent on behalf of active citizenry.

However, as we have shown above for the case of France, the transition is more nuanced, because there are repeated regulatory attempts driven by the hegemonic ideology of the elites, notwithstanding the alternate polities France experienced from the end of the Eighteenth Century onwards. This exception to Soysal and Strang’s thesis could be explained by the fact that, from the Revolution onwards, France established its own ‘national religious ideology,’ except that, rather than being that of the Catholic Church, it was rephrased as *laïcité* [secularism].<sup>57</sup>

### 2.1.3. *Informal education enters the stage*

In light of the above-outlined genealogical roots of formal education in Europe, Dib’s conflation of formalization and hegemonic pedagogies makes sense.<sup>58</sup> His proposal is aimed at countering what had become of European Westernized schooling, as outlined in the previous section. Thus, for Dib, informal education is not just a fact of life, but a

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<sup>55</sup> Soysal and Strang, 285–286.

<sup>56</sup> Soysal and Strang, 285–286.

<sup>57</sup> See Raphaël Liogier, *Une laïcité ‘légitime’: la France et ses religions d’Etat* (Paris: Entrelacs, 2006).

<sup>58</sup> See Dib, ‘Formal, Non-Formal and Informal Education’.

programmatic goal. However, notwithstanding Dib's acknowledgment of this fact, he insists on the fact his distinction is objective rather than subjective. Some clarity could be shed by the work of Mahoney on the same concepts.

Mahoney describes different aspects of informal education: a relaxed atmosphere, where people are at ease;<sup>59</sup> a context-based education, which uses the environment and its interaction with learners to produce educational outcomes;<sup>60</sup> an interventive attitude on behalf of educators;<sup>61</sup> focus on relationships, rather than content;<sup>62</sup> being accepted and welcome as part of a community (e.g., of young people);<sup>63</sup> emphasis of peer education, or at least of an atmosphere of equality among participants.<sup>64</sup>

Drawing the research of Ellis,<sup>65</sup> Mahoney clearly moves beyond Dib's concerns: analytically speaking, formal and informal education are attitudes rather than educational systems—provided the setting allows for sufficient flexibility to shift from one to the other.<sup>66</sup> This means that informal education does not necessarily take place outside schooling environments, but it is definitely less curriculum-sensitive and has the inherent tendency to escape top-down forms of control.

However, if the degree of formalism in an educational context is more of an attitude, this could be empirically controversial because, when faced with other cultures, the educational

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<sup>59</sup> John Mahoney, 'What Is Informal Education?', in *Principles and Practice of Informal Education: Learning through Life*, ed. Linda Deer Richardson and Mary Wolfe (London ; New York: Routledge, 2001), 18.

<sup>60</sup> Mahoney, 18–19.

<sup>61</sup> Mahoney, 20–21.

<sup>62</sup> Mahoney, 22.

<sup>63</sup> Mahoney, 22–25.

<sup>64</sup> Mahoney, 25–27.

<sup>65</sup> John W. Ellis, 'Informal Education – a Christian Perspective', in *Using Informal Education: An Alternative to Casework, Teaching, and Control?*, ed. Tony Jeffs and Mark Smith, Innovations in Education (Milton Keynes, England ; Philadelphia: Open University Press, 1990).

<sup>66</sup> Mahoney, 'What Is Informal Education?', 30–31.

scientist could mistake ‘relaxed’ educational attitudes for effective ones merely because they look distant from the polemic target of Dib’s account—that is, Western traditional schooling. Therefore, though acknowledging the seminal contribution of Mahoney, I would like to relinquish the notions of formal, non-formal and informal education in favour of a research based on more solid conceptual grounds.

## **2.2. Beyond a mentalistic account of learning**

### *2.2.1. Strauss’ taxonomy of learning*

Strauss observes that educational research is at odds when acritical and stereotyped categories are used to address the distinction between domains of learning.<sup>67</sup> One such distinction, for example, is that of “formal education” versus “informal education;” Straus remarks it is misleading because it crystallizes the idea of an opposition between “schooling” and “unschooling.”<sup>68</sup> Straus argues this is highly detrimental to research, since it prevents testing programmes in cross-cultural contexts in which institutions differ from the formal type of schooling that is implemented in other countries or communities.<sup>69</sup> In other words, the ‘formal’ versus ‘informal’ opposition works only when applied to certain types of Western societies.

To correct this, Strauss proposes a new taxonomy for educational research in anthropology, which distinguishes the following elements:<sup>70</sup>

1. Incidental learning
2. Intentional learning
  - a. Ill-defined procedures

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<sup>67</sup> Claudia Strauss, ‘Beyond “Formal” versus “Informal” Education: Uses of Psychological Theory in Anthropological Research’, *Ethos* 12, no. 3 (1984): 197.

<sup>68</sup> Strauss, 195–196.

<sup>69</sup> Strauss, 197.

<sup>70</sup> Strauss, 200.

- b. Well-defined procedures
  - i. Attention-directing acquisition strategy
  - ii. Rehearsal acquisition strategy
  - iii. Chanting acquisition strategy
  - iv. Other specific pedagogies

This taxonomy has inherent merits because it makes room for different types of learning practices. In particular, its most diversified branch, which is that of “well-defined procedures,” can harbour learning practices that come from different cultures—each with its educational effects. Therefore, Strauss believes she has solved the issue of mapping learning in intercultural or comparative settings by defaulting to the psychological dimension of intentionality.

However, I maintain that even Strauss’ taxonomy has its own bias, because of it relies excessively on a mentalistic account of education. On the one hand, this is an epistemologically sound instruments for Strauss to achieve her aims, since she concerns herself with cognitive research in education. On the other hand, however, her solution might still appear ethnocentric or, at the very least, prejudiced, since the roots of this tree-like taxonomy delve deeper into a certain idea of mind and intentionality.

My critique, here, is not that Strauss should discard her taxonomy but that such taxonomy is not sufficient to serve the goals of investigators who seek to establish the mid- and long-term outcomes of education in a supra-individual perspective—that is, by taking into account communities, contexts, and environments. Of course, there is a merit to Strauss’ mentalistic account, but it does not exhaust investigative possibilities. Moreover, the intentional-versus-unintentional root of her taxonomy has the effect of polarizing the culturally-entrenched practices of each of the departing branches, which she understands in light of intentionality and not, say, in light of their historical emergence.

### *2.2.2. An example: educating the bullfighter*

So far, my critique has been purely conceptual, but I would like to highlight its relevance in relation to data concerning a specific activity I witnessed during fieldwork.<sup>71</sup> At this stage, I have not yet discussed methodology so, for the time being, I invite the reader to treat it as an anecdote, which however raises some poignant investigative concerns.

If you visit Terceira Island [*Ilha Terceira*], belonging to the Portuguese archipelago of the Azores, in the middle of the Northern Atlantic Ocean, you might notice—and it will be *hard* not to notice—that, from the end of April until mid-October, the streets of various village-parishes [*freguesias*]<sup>72</sup> of the island are systematically shut on some chosen evenings to host bullfights [*touradas*]. These bullfights take the shape of small-scale festivals and usually entail the release of up to four bulls [*toiros bravos*]<sup>73</sup> at different intervals; the bulls are set free on the streets and all the attendants, from youths to the elders, take turns at dodging the raging animal. Those who do not feel like engaging in such sport stand by the side, usually on top of fencing walls, and enjoy their drinks (mostly beer) as they chew on their pork or beef sandwiches [*bifanas*]. To prevent bulls from running amok, a number of herdsmen [*pastores*]<sup>73</sup>—traditionally: six—are engaged: they wear a traditional white attire and stiff black brimmed hats; they keep the situation in check by pulling a very long rope that is

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<sup>71</sup> For an account of the event, see *Appendix 2: Bullfighting attendance*.

<sup>72</sup> A *freguesia* is a secondary administrative division of Portugal: its deliberative branch is an Assembly [*Assembleia de freguesia*], which is either elected through universal suffrage *or* just overlaps with all the electors; its executive branch is a Board [*Junta de freguesia*], which is usually led by a President [*Presidente*]. See Title VIII, Chapter II of Assembleia Constituinte do Portugal, ‘Constituição da República Portuguesa’, *Diário da República*, I, 86 (10 April 1976).

<sup>73</sup> *Touro* (pl. *touros*) and *toiro* (pl. *toiros*) are equivalent in Portuguese language. As a thumb rule, I tried to stick to the most widespread usage of Terceira Island (*toiro*). Apparently, this does not affect other derived substantives, such as *tourada*. For example, Nuno Godinho, who is a *tourada* fan and posts videos on social networks’ websites, says: “Tourada á corda [...]. Toiros de (ER) Ezequiel Rodrigues.” See: Nuno Godinho, ‘Tourada á corda no terreiro da Serreta’, *Facebook*, 16 October 2022, <https://tinyurl.com/4yk7p47j>.

secured to the neck of the bull before its release. Hence, the name of the practice: ‘rope bullfight’ [*tourada à corda*].

If you then visit the capital of the island, Angra do Heroísmo (pop. 16,810),<sup>74</sup> you might also notice that, in Avenida Jácome de Bruges, neighbourhood of São Bento, there is an imposing circular building: the bullfighting arena, or bullring [*praça de toiros*]. Here, differently from the streets of the rural *freguesias*, a blood sport takes place. A *toiro bravo* is challenged by a horse rider in a fancy suit [*cavaleiro* or *fidalgo*]. During this ‘fight on horse’ [*lide a cavalo*] the *fidalgo* wears out the bull by driving barbed spears of different lengths [*bandarilhas*] into its back. Subsequently, a team of eight *forcados* on foot enters the arena: the brass music that accompanied the first part of the event stops and the leader of the *forcados* challenges the bull until the animal charges him. At this point, he grabs the bull by the head [*pega de cara*] and is immediately surrounded by his teammates, who struggle with the animal until it is forced into compliance and driven back into its enclosure.

Such bullring events, which enjoy sponsors and an international viewership, are organized by the Terceiran Bullfighting Club [*Tertúlia Tauromáquica Terceirense*]. The Club’s headquarters are close to the arena and feature a small museum, an archive of records, meeting rooms decorated with the wallpapers of all previous *toiradas*, and a well-equipped bar for members to party or to watch international bullfighting on TV.

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<sup>74</sup> The Portuguese 2021 Census defines the urban area of Angra do Heroísmo as encompassing the following *freguesias*: Feteira, Nossa Senhora da Conceição, Ribeirinha, Santa Luzia, São Bento, São Pedro and Sé. Differently from their rural counterparts, these *freguesias* appear like neighbourhoods of the same town. Overall, the Municipality of Angra do Heroísmo, including the rural *freguesia*, harbours 35,402 residents. See: INE, ‘Censos 2021: Contámos com todos – resultados provisórios’, Informação estatística (Lisboa: INE – Instituto Nacional de Estatística, 30 August 2022), [https://www.ine.pt/scripts/db\\_censos\\_2021.html](https://www.ine.pt/scripts/db_censos_2021.html).



How could bullfighting training be understood, according to Strauss' categories? Non-intentional training could involve a bull escaping its enclosure and farmers running around town, trying to catch it. The goal of such activity would not be learning *per se* but the safety of the community. However, incidentally, people engaged in such activity might *also* learn how to dodge the bull, how to calm it down and, generally speaking, how to deal with it.

But there are also forms of intentional training that follow ill-defined procedures. For example, a youth could climb the fence of an enclosure and challenge the bull himself. Much like the 'escaped bull' scenario, some conditioning takes place. However, there are still no rules, no actual set up, and no controlled results. Learning *occurs* but it is not necessarily placed in a broader context. The epistemological reference, here, is to Lakatos' critique of Popper: a single falsification event does not amount to science, which is much more than that.<sup>75</sup> Knowledge could be predicated of individuals, but science is collective. Analogously, learning could be an individual process, but education has a broader scope.

Finally, we have the well-defined procedures. The training of a bullfighter becomes first amateurish, then professional. Training sessions are organized with scenarios that pose a sufficient challenge for the trainee to explore his limits, but not in an excessive amount, to prevent him being overcome by the events. In July 2021, my various informants spoke at length about the gradual nature of such process: wannabe bullfighters start with the younger bulls, so that they get acquainted with their behaviour; periodically, a bull of a greater size is introduced, to make the practice increasingly more challenging. Bullfighting is broken down into different components, which could be practiced separately: running from the bull, grabbing its head, avoiding being trampled, etc.

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<sup>75</sup> Imre Lakatos, 'Science and Pseudoscience', in *Philosophy in the Open*, ed. Godfrey Vesey (Open University Press, 1974).

The above ‘curriculum’ is exemplified by an induction session organized on February 12, 2022, by the Grupo de Forcados Amadores do Ramo Grande (an amateur bullfighters association). Under the guidance of the trainer, children and adults take turns at grabbing the bull by the head, except that the ‘bull,’ in this case, is a padded cart pushed by an assistant. They learn the attitude, the pose, the rules, and the dress code. For instance, they wrap their bellies with long stripes of red band. What follows is a journal entry concerning the training session, which has also been recorded and posted online by AzorMais Productions:

“A young, 12-year-old boy advances with bold steps and stares at the trainer with a scowl on his face. Then he claps, as they taught him, to entice the invisible bull into charging. Another clap, some shouts, and the assistant rushes in with the training-cart. The boy steps back once, then realizes that the cart is not going to stop, so he starts retreating without showing his back to the make-believe bull. After a sufficiently long retreat, the trainer slows down the cart, so to simulate the loss of momentum in the charge. At this stage, the boy opens his arms and lets the pretence animal take him; his teammates rush from behind and eventually stop the charge with their bodyweight.”

Procedures, here, are neatly defined. However, one thing is training to dodge a bull; another thing is *educating* a bullfighter. Terceiran people are well aware of the fact that being good at dodging bulls does not saturate the definition of bullfighter. In fact, they often talk of “bullfighting culture [*cultura tauromáquica*].” This notion is outlined by the trainer, Ezequiel Rodrigues, in his published interview:

“Bullfighting is a folk playday [...]. Terceira, in fact, is a bullfighting island [...]. The main goal of our association, for the most, is to promote and dignify bullfighting and the figure of the amateur *forcado*. Being *forcado*, being an amateur *forcado*, means passion, [...] friendship, mutual help, resilience, which are values that tend to disappear from society but which our association [promotes] [...]. Being *forcado* in the arena is only a small part of being a *forcado*. I would like to offer an example of this, drawn on the *forcado* group of Santarém, one of the most ancient in Portugal. For me, it was a school of life [...]. All *forcados* are afraid but being a *forcado* means being able to overcome the fear and apply this to our daily lives [...]. *Forcados* are the most professional workers, the most reliable friends, the best relatives. *Forcados* are naturally altruistic, they help whoever needs help [...]. Of course, we train to face

the bull, but there is much more to that than just making a physical effort. These are, so to speak, spiritual things.”<sup>76</sup>

If we take this testimony at face value, it means that the education of a bullfighter is not just a personal matter and does not just involve a list of skills. Rather, it requires a range of competencies, which are nurtured by the surrounding social environment. In this sense, an educational account of bullfighting would not be limited to the analysis of what happens during training or, at best, in the arena during a real fight. Instead, it should also include elements such as: bullfighting culture symbols, artifacts, social attitudes, camaraderie, values such as courage and bravery, risk management, family relationships, altruistic exchanges, etc.

### 2.2.3. *Introducing competency-based education*

The complexity of such an educational scenario proves that education is not limited to procedures for the acquisition of skills, let alone an exclusive focus on individuals. This conceptual move is well-known in education science. Therefore, to account for it, I will draw on a seminal background paper by Hipkins: although it dates back 2006, it constitutes a reliable and concise summary of state-of-the-art education science.

According to Hipkins, the concept of *competency* stems from the need to take into consideration that *skills* are worthless if not accompanied by appropriate *dispositions*: “, skills per se can never be an adequate response to this goal because people have to want to do [...] things.”<sup>77</sup> Therefore, the idea of competency “combine[s] the more traditional focus on

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<sup>76</sup> 1º *Treino da época do GFARG, na Terra Chã, 12.02.2022, 2022, sc. 01:28, <https://www.youtube.com/watch?v=xuYe4M9TsGg>.*

<sup>77</sup> Rosemary Hipkins, ‘The Nature of the Key Competencies: A Background Paper’, Background document (Wellington: New Zealand Council for Educational Research, 2006), 2, <https://www.nzcer.org.nz/research/publications/nature-key-competencies-background-paper>.

curriculum *knowledge* with the use of appropriate *skills* and *values*,”<sup>78</sup> whose interaction could be only assessed in real case scenarios, situational judgement tests, or, broadly speaking, *performance*-based activities.<sup>79</sup>

The inherent performative nature of competencies shifts the focus from the individual to the *context*.<sup>80</sup> This does not mean that competency-based education ignores the importance of learners, but that it overcomes individualist accounts of learning that enjoy a mentalistic nature—such as the one which inspired Strauss’ taxonomy. Accordingly, all learning is “*situated learning*,”<sup>81</sup> which means that learning takes place in precise contexts, which are characterized by contingent elements.<sup>82</sup>

An interesting aspect of situatedness is that, over time, contexts tend to accrue their repertoire of artefacts and opportunities. These, when placed in a specific social setting, acquire significance, and produce their social and educational effects.

#### 2.2.4. *Merits and flaws of the bioecological developmental model*

The relevance of social settings is another reason to shift the focus from individuals to supra-individual layers that enable change and transformation. Additionally, by partaking in such (societal) processes, individuals acquire meaning, even though the outcomes do not impact all individuals in the same way.

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<sup>78</sup> Hipkins, 4.

<sup>79</sup> Hipkins, 6.

<sup>80</sup> Hipkins, 7.

<sup>81</sup> See also Jean Lave and Etienne Wenger, *Situated Learning: Legitimate Peripheral Participation*, Learning in Doing (Cambridge [England]; New York: Cambridge University Press, 1991).

<sup>82</sup> Hipkins, ‘The Nature of the Key Competencies: A Background Paper’, 7.

This is a step forward from Bronfenbrenner and Evans' bioecological model, which was proposed in 2000.<sup>83</sup> According to such model, the development of a human being could be understood as the competent (or dysfunctional) outcome of “proximal processes,” which are defined as multidirectional “transfer[s] of energy between the developing human being and the persons, objects, and symbols in the immediate environment.”<sup>84</sup>

Although the bioecological model acknowledges that proximal processes result from both individual predispositions and historical contingencies, it overlooks the fact that the individual is not the sole subject at play. That is, Bronfenbrenner and Evans reiterate a foreground–background dyad, which might be fruitful for developmental science—to which the two scholars are committed—but understates the ontological status of contextual elements... such as those described by the bullfighting trainer in the above interview.<sup>85</sup>

To say that Bronfenbrenner and Evans overlook the ontological relevance of context might sound outlandish. After all, Bronfenbrenner is credited with having shifted the focus of developmental psychologists by looking precisely *at* context.<sup>86</sup> However, as Vélez-Agosto et al. remark, his treatment of culture is problematic because, notwithstanding later adjustments, the bioecological model addresses culture as a macrosystem that is separate from

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<sup>83</sup> The bioecological model is the latest by Bronfenbrenner. Here, I will not address his older Ecological Systems Theory. For the latter, see Urie Bronfenbrenner, ‘Developmental Research, Public Policy, and the Ecology of Childhood’, *Child Development* 45, no. 1 (March 1974): 1, <https://doi.org/10.2307/1127743>; Urie Bronfenbrenner, ‘Toward an Experimental Ecology of Human Development.’, *American Psychologist* 32, no. 7 (July 1977): 513–31, <https://doi.org/10.1037/0003-066X.32.7.513>.

<sup>84</sup> Urie Bronfenbrenner and Gary W. Evans, ‘Developmental Science in the 21<sup>st</sup> Century: Emerging Questions, Theoretical Models, Research Designs and Empirical Findings’, *Social Development* 9, no. 1 (February 2002): 118, <https://doi.org/10.1111/1467-9507.00114>.

<sup>85</sup> *1º Treino da época do GFARG, na Terra Chã, 12.02.2022.*

<sup>86</sup> See, e.g., Jennifer M. Bowes, Rebekah Grace, and Kerry Hodge, eds., ‘The Role of Context in Children’s Development’, in *Children, Families and Communities: Contexts and Consequences*, 4th ed. (South Melbourne, Vic: Oxford University Press, 2012), 3–16.

individuals—that is, a mere ‘external’ factor in their lives.<sup>87</sup> Vélez-Agosto et al. write: “if culture enters developmental research as an external factor from another system, its analysis is reduced to describing the interaction with other systems.”<sup>88</sup> Such understanding, which is based on the works of Vygotsky, Weisner, and Rogoff, leads Vélez-Agosto et al. to reconceptualize development:

“Human development takes place within a cultural system. Culture constitutes the context and reality of the developing person and that makes culture a paradigm. From a practical dimension, individuals participate in cultural practices shaped by context specificity and interact with communities and social institutions that are both proximal and distal. Communities and social institutions are also interpretative systems that have the power to change and be changed in those interactions. Culture is embedded in all institutions that have the power to homogenize the daily routines within that context through political policies, laws, and regulations. Individuals interact in different contexts and internalize certain cultural values and practices, making each experience unique from a particular time in life development.”<sup>89</sup>

Accordingly, in their model, Vélez-Agosto et al. propose to locate all cultural elements at the micro level, like a spiral that surrounds the individual and which is characterized by different nodes, which take turns in terms of proximity to the developing subject.<sup>90</sup>

Think of the bullfighting culture again. Youths and adults who engage in bullfight training are not just learning skills but adopting a whole new lifestyle. Their intentions might not coincide with the direction the Amateur Association is taking, but the latter operates as a vector that results from all participating tendencies. Lifestyle extends well beyond Strauss’ well-defined procedures and encompasses a series of practices that surround the sporting event. Lack of well-defined and outspoken procedures does not imply that norms are missing:

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<sup>87</sup> Nicole M. Vélez-Agosto et al., ‘Bronfenbrenner’s Bioecological Theory Revision: Moving Culture From the Macro Into the Micro’, *Perspectives on Psychological Science* 12, no. 5 (September 2017): 900–903, <https://doi.org/10.1177/1745691617704397>.

<sup>88</sup> Vélez-Agosto et al., 904.

<sup>89</sup> Vélez-Agosto et al., 906.

<sup>90</sup> Vélez-Agosto et al., 907.

indeed, most social interactions are regulated by unwritten rules, which nonetheless enjoy sufficient permanence to produce effects in the mid- and long-term.

#### 2.2.5. *Supra-individual subjects of the educational process: communities of practices*

By developing ‘bullfighting competencies,’ *forcados* nurture a community. In fact, as anticipated in the previous paragraphs, individuals are not the only party in this game. In this regards, Vélez-Agosto et al.’s model is still too centred on the individual. They have epistemological reasons for that, which are grounded in the paradigms of developmental science. However, from their point of view, the *situatedness* of the educational process is considered, but not its *distributed nature*.

In fact, if we acknowledge that everyday actions are culture-laden, the changing proximity of cultural elements (that is, Vélez-Agosto et al.’s spinning spiral) entails the possibility of some elements becoming more consolidated over time—no matter if the originally engaged individuals are present or not. This results in recurrent features of the cultural landscape—perchance ‘traditions.’

*Prima facie*, the acknowledgment of the existence of distributed elements might suggest a return to Bronfenbrenner and Evan’s idea of “macrosystem:” after all, *some* factors are *quite* external. However, this would clash with Vélez-Agosto et al., who could contend that, whenever the macrosystem enters the lives of individuals, it still appears as a force within their personal microsystems.

Unfortunately, both these approaches would require a different analysis for each solicited individual. Instead, what I am proposing here is to embrace a Copernican Revolution and keep the focus on communities, in general—and communities of practice, in particular. The

role of communities has been famously investigated by Lave and Wenger,<sup>91</sup> whose framework I will address here, drawing also on the synthesis published by Ovando.<sup>92</sup>

Lave and Wenger investigated apprenticeships and realized that these types of “learning *in situ*” were only peculiar instances of a transversal aspect of learning, which they dub “situatedness.”<sup>93</sup> Their paradigm gives priority to “social practice” over “cognitive processes” and, as such, overcomes the previously mentioned mentalistic framework.<sup>94</sup> On top of that, they argue that “learning is an integral part of generative social practice in the lived-in world.”<sup>95</sup>

In an attempt to specify the ontological placement of learning within social life, Lave and Wenger speak of “legitimate peripheral participation.”<sup>96</sup> However, as they themselves remark at the outset of their study,<sup>97</sup> this phrase is fraught with semantic ambiguity. That is, legitimacy calls for illegitimacy, and peripherality calls for centredness.

What I believe they were grasping at, is a ‘situated’ conception of the Zone of Proximal Development. In Vygotsky’s original formulation, the Zone of Proximal Development is “the distance between the actual developmental level as determined by independent problem solving and the level of potential development as determined through problem-solving under adult guidance, or in collaboration with more capable peers.”<sup>98</sup> As such, it is meant to highlight the ‘crossable’ gap between what one could attain with her own devices

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<sup>91</sup> Lave and Wenger, *Situated Learning*.

<sup>92</sup> Karla Del Carpio Ovando, ‘Why Learn in Isolation When We Can Learn in a Community of Practice?’, *Revista de Educación Social* 17 (July 2013): 1–13.

<sup>93</sup> Lave and Wenger, *Situated Learning*, 29–31.

<sup>94</sup> Lave and Wenger, 34.

<sup>95</sup> Lave and Wenger, 35.

<sup>96</sup> Lave and Wenger, 35–36.

<sup>97</sup> Lave and Wenger, 36.

<sup>98</sup> Lev Semyonovich Vygotsky, *Mind in Society: The Development of Higher Psychological Processes* (Cambridge, MA: Harvard University Press, 1978), 86.



(“independent problem solving”) and what one could attain through guided practice. Phrased this way, this sounds like a concept belonging to the mentalistic framework. However, as remarked by Bruner:

“The idea [of ZPD] is a fusion of the idea of collectivism and of the role of consciousness. Indeed, as I see it, the ZPD is a direct expression of the way in which the division of labor expresses itself in a collectivist society. It involves a sharing not only of knowledge but of consciousness, albeit an historically shaped consciousness. Those who ‘know’ more, those who have ‘higher’ consciousness share it with those who know less, who are less developed in consciousness and intellectual control. Each in his or her time comes to have a mind shaped by the historical and economic circumstances of the period (and of history in general by extension), but the transmission of mind across history is effected not by blind material forces but by the form of mental sharing that we now know as the zone of proximal development.”<sup>99</sup>

By saying that Lave and Wenger had come across the need to provide a *situated* account of the Zone of Proximal Development, I mean that they were effectively trying to pinpoint the *social placement* of learning. Their idea of “legitimate peripheral participation” does exactly this: assuming that there are different degrees of competence, there must be different degrees of inclusion in a community of practice. That is not to say that peripheral participants are shunned or ill-included, but just that they cannot (objectively) perform within the same community at the level of seasoned experts.

All the elements highlighted by Bruner in Vygotsky’s work are present: experts share their know-how with the novices; rules—written and unwritten—are in place; by moving at the margins of the community, novices can test their performance against the optimal functioning of the community. Together with Bruner, we might say that a community flourishes the more

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<sup>99</sup> Jerome Bruner, ‘Vygotsky’s Zone of Proximal Development: The Hidden Agenda’, *New Directions for Child and Adolescent Development* 1984, no. 23 (March 1984): 94, <https://doi.org/10.1002/cd.23219842309>.

it is able to tolerate and nurture the existence of a periphery of participants, who are allowed to engage in its practices proportionally to their ability to commit.<sup>100</sup>

It is perchance intriguing that Lave and Wenger, in their empirical studies, give less room to the notion of Zone of Proximal Development,<sup>101</sup> considering their key concept of legitimate peripheral participation maps onto it. Their only partial commitment to it is included in a paragraph on internalization,<sup>102</sup> and they eventually side with Engeström's interpretation of this Vygotskyan concept, which emphasizes the tension between "individual actions" and the society of the future.<sup>103</sup>

In sum, Lave and Wenger appreciate the fact that learning involves "membership" and that membership comes in degrees.<sup>104</sup> Accordingly, education science cannot focus solely on individuals:

"In any given concrete community of practice the process of community reproduction – a historically constructed, ongoing, conflicting, synergistic structuring of activity and relations among practitioners – must be deciphered in order to understand specific forms of legitimate peripheral participation through time. This requires a broader conception of individual and collective biographies than the single segment encompassed in studies of 'learners'."<sup>105</sup>

As Ovando puts it, to recognize a community of practice we should identify:

- A "domain" of shared "interest."<sup>106</sup>
- Existing "relationships" between human beings.<sup>107</sup>
- A process of development of "a shared repertoire of resources: experiences, stories, tools, ways of addressing recurring problems."<sup>108</sup>

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<sup>100</sup> Compare with Bruner, 96.

<sup>101</sup> See, e.g., Lave and Wenger, *Situated Learning*, 61.

<sup>102</sup> Lave and Wenger, 49.

<sup>103</sup> Yrjö Engeström, *Learning by Expanding: An Activity-Theoretical Approach to Developmental Research*, 2nd ed. (Cambridge University Press, 2014), 138, <https://doi.org/10.1017/CBO9781139814744>.

<sup>104</sup> Lave and Wenger, *Situated Learning*, 53.

<sup>105</sup> Lave and Wenger, 56.

<sup>106</sup> Ovando, 'Why Learn in Isolation When We Can Learn in a Community of Practice?', 3.

<sup>107</sup> Ovando, 3.

<sup>108</sup> Ovando, 4.

In this respect, Terceira's bullfighting community is an effective community of practice because, ideally, it has room for everyone. Membership ranges from workers that have a stake in the cattle industry to spectators and fans. The positive effect of the domain (i.e., bullfighting) in nurturing the community does not lie with specific functions it performs, but with its overall capability to nurture bonds between people.

Multiple interpretations are provided for bullfighting. To name a few: Birrell stresses on the importance of the ritual function of the "athlete," who undergoes unnecessary vicissitudes to make the public realize what their moral constraints are;<sup>109</sup> Douglass highlights how the bullfight stages a binary relationship between a man and a woman.<sup>110</sup> However, when analysed as a community of practice, taurine culture shows its relative communitarian healthiness not because a specific interpretation is true, but because interpretations are *possible*. As such, the community of practice guarantees different types of *positioning*: of the community against the background of society, and of different members inside the community.

For example, bullfight trainer's Ezequiel Rodrigues' positioning, as it emerges from his interview, is that of a family man, altruistic, who engages in acts of reciprocity, and enjoys a broad and diverse social network.<sup>111</sup> Other two former *forcados* I gossiped with in August 2021, who were more than 60 years old, enjoyed being part of the community and demonstrated that their inclusion represented an opportunity to rewrite their lives in light of their ability to organize events. In fact, their narrative painted a bleak history of *touradas*

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<sup>109</sup> Susan Birrell, 'Sport as Ritual: Interpretations from Durkheim to Goffman', *Social Forces* 60, no. 2 (December 1981): 354, <https://doi.org/10.2307/2578440>.

<sup>110</sup> Carrie B. Douglass, '*Toro Muerto, Vaca Es*: An Interpretation of the Spanish Bullfight', *American Ethnologist* 11, no. 2 (May 1984): 242–58, <https://doi.org/10.1525/ae.1984.11.2.02a00020>.

<sup>111</sup> *1º Treino da época do GFARG, na Terra Chã, 12.02.2022.*

being marginalized and shunned up until the 1960s, when they began putting together what would later become the *Tertúlia* as we know it—Terceira’s Bullfighting Club. But the striking aspect of my interaction with them, which speaks volumes about the nature of functional communities, was their inclusiveness: grumpy at first, both *forcados* ended up advertising their activities to me as if I were a novice waiting to start on my first training day. Other communities of practice might be less open—or, at least, less open to people matching my demographics—but, to reiterate Lave and Wenger’s argument, what matters in education is their ability to include participants at different levels and at different roles: “from each according to his ability.”<sup>112</sup>

#### 2.2.6. *Greater Humanities for Education:*<sup>113</sup> *a simplified framework*

Aside from producing an analytical framework, education science does not limit itself to the identification of concept-matching empirical realities. Instead, it does so *for a purpose*. In other words, we could stop at the revision of Lave and Wenger’s framework, adopt Ovando’s list of criteria and show that a specific community matches such criteria. Such work would be both analytical and interpretive but, without *a purpose*, it would not fully fit the requirements of education science.

The idea of including strong *purposefulness* in social science is in line with Clifford’s humanities manifesto, in which he coins the expression “Greater Humanities.” He uses this expression because he believes a common scientific foundation is possible for all the different research programmes that multiplied under the label of human and social

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<sup>112</sup> Karl Marx, ‘Kritik Des Gothaer Programms’, *Die Neue Zeit* 1, no. 18 (1891).

<sup>113</sup> This section is a heavy reworking of a framework I worked on at the outset of my doctoral studies, and whose results have been published as Andrea Mattia Marcelli, ‘Greater Humanities for Education’, *Formazione & Insegnamento* 18, no. 1 (2020): 144–56, [https://doi.org/10.7346/-fei-XVIII-01-20\\_13](https://doi.org/10.7346/-fei-XVIII-01-20_13).

sciences.<sup>114</sup> I have already shown his framework is generally applicable to education science,<sup>115</sup> but here I would like to adjust some of its principles to make it more compliant with the above theoretical reflections on the situated nature of education.

Clifford states that the Greater Humanities share the following features: realism, history, hermeneutics, and ethics.<sup>116</sup> This is a reading of Clifford's four tenets:

- *Realism* should be understood in the broad sense, as the acceptance that, to some extent, there are phenomena that a knower cannot identify with, and that are independent of her; the resulting principle is that of a cautious empiricism, which accepts observational inputs but is aware of the fact they do not exhaust the epistemic effort of the scientist.
- *History* is called into question because social instances are understood to be dependent on contingencies; additionally, human sciences are inherently concerned by the diachronic nature of the occurrences they study, because there is little opportunity to grasp meaning and significance as the anachronistic snapshot of a shard of reality.
- *Hermeneutics* has a double relevance for human sciences: on the one hand, because interpretation is a core human activity, and on the other hand, because interpretation is required to make sense of the inevitably fragmented data that result from the empirical investigations of the social world and its artefacts.
- Finally, *ethics* comes into play for two reasons: the first is that deliberation and value-driven decision making is part and parcel of human social activities, the second is because we *ask* things of human sciences; we ask directions, we demand that their creative effort produces new worldviews, and we ask them to meet our needs and solve our issues.

In light of Lave and Wenger, I suggest we conflate the four above points into two main entries: *situatedness* and *practice*.

- 'Situatedness' subsumes historical realism. It accounts for the empirical flavour of Clifford's manifesto, which does not aim to make humanities into an unbound make-believe effort. Moreover, 'situatedness' is a core concept of the 'communities of practice' approach to education; that is, because it accounts for the contingent nature of educational processes and the need to understand both the context and the historical background of a community to profit from its educational experience.
- 'Practice' subsumes hermeneutics and ethics. The latter is understood not as the study of moral choices but rather as the act of making moral choices and deriving outcomes

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<sup>114</sup> James Clifford, 'The Greater Humanities', *Occasion: Interdisciplinary Studies in the Humanities* 5 (2013): 1–5.

<sup>115</sup> Marcelli, 'Greater Humanities for Education'.

<sup>116</sup> Clifford, 'The Greater Humanities'.

from the values we entertain. Accordingly, actions are performed and become the telling elements of how we conceive the world and society.

Not only such simplified framework throws a bridge across the gap between Clifford's work and that of Lave and Wenger, but it does also move us further away from a mentalistic conception of education and learning. Here, priority is given to things people *do* rather than their beliefs. In this sense, the simplified 'situatedness-practice' framework recasts the Deweyan emphasis on experience: "The conceptions of *situation* and *interaction* are inseparable from each other. An experience is always what it is because of a transaction taking place between an individual and what, at the time, constitutes his environment."<sup>117</sup>

By this, I do not intend to skip on the study of the meaning people attribute to their actions. In fact, the acquisition of meaningfulness through community involvement is deemed by Dewey to be one of the key aspects of purposeful learning: "Genuine communication involves contagion; its name should not be taken in vain by terming communication that which produces no community of thought and purpose between the child and the race of which he is the heir."<sup>118</sup>

However, I want to raise awareness about modernist over-reliance on mentalistic representations as the main way to attribute value: in my view, communities should not be held to the same standards of individuals when it comes to knowledge-ascriptions and similar processes. This means that explicit narratives that attribute meaning to things might not be the best way to detect processes: for example, many in Terceira cherish the distant past of the

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<sup>117</sup> John Dewey, *Experience and Education*, The Kappa Delta Pi Lecture Series (New York: Touchstone, 1997), 44.

<sup>118</sup> John Dewey, *How We Think*, 1st ed. (Boston, New York, Chicago: D. C. Heath & Co., 1910), 225.

archipelago and address history by telling tales of the courage and bravery of Terceira's warrior people; however, during fieldwork, this aspect did not seem to be prominent.<sup>119</sup>

### 2.2.7. *Situatedness and practice: operationalization*

Prioritizing situated practice in education studies calls for an operationalization of these concepts. Therefore, I would like to introduce 'negotiability' as an ancillary notion that could help us identify an appropriate qualitative scale that is instrumental to our understanding of education as an interaction between individuals, communities, and their environment.

A *negotiable* aspect is something agents can change, depending on the degree the phenomenon is sensitive to the agents' action. A *non-negotiable* aspect is something agents have to come to terms with, no matter what: it happens not *because* of them, but *in spite* of them.

The innovation entailed by talking of negotiability and non-negotiability—or the 'negotiability continuum'—is that this dyad unlocks the possibility of conceiving an agentic system that is supra-individual. For example, some things might not be negotiable for an individual, but a community might afford to do so. Thus, depending on the layer of social reality we address, different possibilities unfold. In other words, negotiability is a parameter that 'explodes' or 'extrudes' the individual dimension into a series of possibilities whose realization could be accounted for by different levels of collective action. This is, again, apparent in bullfighting: the *forcado da cara*, who leads the team, is not able to tackle the

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<sup>119</sup> Such view is sympathetic with Rorty's critique of representationalism but it is more concerned with making a distinction between what explicit narratives tell us, and what is instead told by actions. See: Koichiro Misawa, 'On What We Call the World and Human Experience: Rorty, McDowell, and a Socio-Historical Genesis of Human Naturalness', *Mind, Culture, and Activity* 27, no. 1 (2 January 2020): 22, <https://doi.org/10.1080/10749039.2019.1660789>.

bull by himself; however, with the help of his teammates the bull could be managed. What is not negotiable for the individual could, and in fact *is*, negotiable for the group.

If the continuum of negotiability partially saturates the need to measure the extent of the ‘situation’ agents are involved with, as well as the type and number of resources they need to overcome a challenge or cope with it, another continuum is needed to illustrate the complex dimension of ‘practice.’ I maintain that such continuum could be subsumed with the Foucauldian notion of ‘apparatus’ [*appareil*].

To avoid etymological conundrums, Bussolini highlights the fact that, in Foucauldian terms, apparatuses cannot be reduced to mere ‘devices,’ because a “device” is mechanical in essence, whereas an apparatus could be made of people, norms, and regulations.<sup>120</sup> However, he highlights the seemingly mechanistic nature of apparatuses, which become purposeful only when *deployed*.<sup>121</sup> While ‘deployment’ presumes a strategic goal and its pursuance (hence, a *dispositif* in the etymological sense of the term), an apparatus does not have an end in itself. By borrowing again Bussolini’s examples, we could claim that one thing is a camera, which is an apparatus to take pictures embodied in a material device; another thing is its usage as a way to promote a certain product. In other words: cameras are not the same thing as industrial photography. Yet, since apparatuses do not perfectly overlap with devices, apparatuses are best understood with reference to the military: an army is an *appareil*, which encompasses a series of elements (and individuals) in functional relation with each other; conversely, a war is a *dispositif*, since it deploys apparatuses to obtain something.<sup>122</sup>

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<sup>120</sup> Jeffrey Bussolini, ‘What Is a Dispositive?’, *Foucault Studies*, no. 10 (1 November 2010): 93–94, 95, <https://doi.org/10.22439/fs.v0i10.3120>.

<sup>121</sup> See Bussolini, 95.

<sup>122</sup> Bussolini, 94–96.



For the time being, I would like to avoid stressing on the *dispositif* and limit myself to the notion of apparatus. Like negotiability, apparatuses imply the possibility of a supra-individual dimension and their organization account for different levels of complexity. This makes apparatuses the best candidates to appreciate how practice could be understood at the community level.

Moreover, the presence or absence of an apparatus highlights how processes of learning are embedded in communities and contexts in ways that Strauss' taxonomy could not have accounted for. When an apparatus is present, and working, a mere technique that produces effects on a limited number of individuals is magnified and invests the whole community. For example, think of a confession:<sup>123</sup> the technique of telling one's secrets could be just a way to bond between individuals or a way to restore the status of a subject within a Christian (Catholic) community. Although we might think of cultures in which confession and friendship are closely tied, in the former case there is no specific apparatus in place. Instead, in the latter case, the apparatus is deployed and has an impact on the individual's life, the community, and, allegedly, the Heavens. Hence, even if the technique is the same, effects differ whether we are in presence of an apparatus or not. The resulting framework is summarized in *Table 2*. It is imperfect, but its flaws help to illustrate the difficulties cradled in overcoming educational mentalism and approach community studies in a context-sensitive approach.

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<sup>123</sup> This example is loosely based on Michel Foucault, *Les aveux de la chair: Histoire de la sexualité IV*, ed. Frédéric Gros, Bibliothèque des Histoires (Paris: Gallimard, 2018).

	Apparatus is deployed	Apparatus is not deployed
Negotiable	An individual is invited to confess her sins to restore her position among a Christian community. <i>Outcome:</i> the sense of self has changed. Construction of the self as a sinner. Social inclusion.	An individual tells her secrets to a friend. <i>Outcome:</i> the two individuals now enjoy shared knowledge.
Non-negotiable	Youths join a team of fishermen to learn how to fish. Fishing is the only convenient source of food for the islanders. <i>Outcome:</i> youths learn how to exploit a natural resource to meet essential needs.	An earthquake occurs, and those who survived learn how to cope with the aftermath of this horrifying incident. <i>Outcome:</i> new ways of coping and managing resources are found.

Table 2: intersections between apparatuses and negotiability

Looking at Table 2, a first remark is that negotiability and non-negotiability belong to a blurred continuum, rather than clear-cut categories. For instance, one might ask *what* is negotiable in each of Table 2's entries. It might be objected that fish being the only resource is a non-negotiable element of the educational process, but of course the choice of which board to boat could be fully negotiable. Additionally, it might be pointed out that if the choice of the fishermen team is non-negotiable for the individual learner, its non-negotiability does not take the shape of the non-negotiability of the earthquake or of the fishing-constrained economy: cultural norms could always be negotiated, depending on historical contingencies.

This prompts us to the second remark, which concerns the use of the notion of *technique*. In Foucauldian sociology, *techniques* are always present in a social setting.<sup>124</sup> For example, in the case of the two friends telling each other's secrets, we could wonder whether the community they live in is characterised by practices of secret-telling as essential components for the construction of relationships of friendships. If that is the case, the two are acting according to a pre-existing *technique*, which works as a friendship-producing protocol in that given culture. Analogously, in the case of the earthquake, there might be pre-existing

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<sup>124</sup> Compare with Michel Foucault et al., eds., *Technologies of the Self: A Seminar with Michel Foucault* (Amherst: University of Massachusetts Press, 1988).

*techniques* of coping, which might act at different levels: for example, an individual might not change the fact her house has been destroyed but she could change her mind about the incident—and her culture might provide her with instruments to do so. Alternatively, where no pre-existing *technique* is active or ready to be deployed, communities and individuals might come up with new *technique*. Later, they become part of their heritage.

Finally, another point concerns history. In fact, as already anticipated in the former examples, all of the above table entries are subject to change. What is non-negotiable at a given moment might turn out to be negotiable as new *techniques* come into existence. For instance, they might entail technologies that help humans exert power over the environment: new fishing methods, refrigeration, fuel engines, etc.

At this stage, I am still not able to account for different ‘degrees’ in the complexity of apparatuses. Thus, for the time being, rather than drawing on a scale I will employ it as a binary notion: either the apparatus is present (or *mostly* present) or it is absent (or *mostly* absent). This is a further simplification but, differently from what had been previously said concerning the need for a simplified framework, this choice is not due to epistemological considerations but to lack of research in this direction—which will be probably addressed in a later publication.

### **2.3. Ecopedagogy**

By drawing on the notions of situatedness and practice, I have tried to attain a non-mentalistic account of learning that sympathizes with the theories of Lave and Wenger.<sup>125</sup> Furthermore, I have tried to operationalize the two by identifying two scales that are liable to empirical investigation: negotiability and apparatus.

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<sup>125</sup> See Lave and Wenger, *Situated Learning*.

The above epistemological remarks call for a better modelling of the relationship between human beings and their environment. The way human relationship with the environment is managed is what characterises the *ways* of communities and, as such, it determines opportunities and affordances for their members. This is paramount for education science: if its epistemological goal is to provide instruments and strategies to govern human change and fulfilment, this could be achieved only through the understanding of the relationship between human beings and the environment. This leads to the concept of *ecopedagogy*.

I argue ecopedagogy is the best paradigm in this sense, inasmuch it accounts for the environment in a way that enables us to overcome the stereotyped dichotomy between nature and nurture and embrace a holistic vision of human beings' placement within broader and *living* reality.

<i>Ecopedagogy</i>		<b>Paradigm</b>
Situatedness	Practice	<b>Core concepts</b>
<i>Negotiability continuum</i>	<i>Apparatus complexity</i>	<b>Operationalization</b>

Table 3: Summary of the epistemological framework.

### 2.3.1. A holistic paradigm

From 3 to 14 June 1992, the *United Nations Conference on Environment and Development (UNCED)* took place in Rio de Janeiro.<sup>126</sup> This event was in fact the first *Earth Summit* and is known under different names and acronyms: *Rio Summit*, *Rio Conference*, and *ECO92*. As Gadotti recounts, the event resulted in 34 treaties being signed by different stakeholders, including “the *Earth Charter* and the *Treaty for Sustainable Education*,”<sup>127</sup> however, the

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<sup>126</sup> Michos Tzovaras, *Dr. Zhelyu Zhelev, President of the Republic of Bulgaria, Addresses the Conference*, 3 June 1992, 3 June 1992, UN Photo Digital Asset Management System.

<sup>127</sup> Moacir Gadotti, *A Carta da Terra na educação*, Cidadania Planetária (São Paulo: Editoria e Livraria Instituto Paulo Freire, 2010), 15, <http://acervo.paulofreire.org:8080/xmlui/handle/7891/2812>.

United Nations did *not* adopt the *Earth Charter* but only endorsed it.<sup>128</sup> Instead, the *Earth Charter* was substituted by the *Rio Declaration on Environment and Development*<sup>129</sup>— which, according to Gadotti, is “anthropocentric,” disrespectful, and deprived of its moral charge.<sup>130</sup>

Aiming to exploit the educational potential of the *Earth Charter*, the *Ecopedagogy Charter* was produced in 1999 during the *Iº Encontro Internacional da Carta da Terra na Perspectiva da Educação* organized by Instituto Paulo Freire.<sup>131</sup> During the meeting, the *Ecopedagogy Charter* was produced, with the goal of reconciling the *Earth Charter* with education. It has the following principles:<sup>132</sup>

1. The planet is the only community
2. The Earth is a mother, a living and evolving organism.
3. A new awareness [must arise], to tell what is sustainable, appropriate, and necessary for our existence.
4. Tenderness towards this house, our common address, the Earth.
5. Socio-cosmic justice: Earth, as a living organism, is also oppressed.
6. A pedagogy that promotes life: getting involved, communicating, sharing, problematizing, relate.
7. Knowledge is complete when it is shared.
8. Carry oneself coherently and with meaning in everyday life.
9. An intuitive and communicative rationality: sentimental, not instrumental.
10. New attitudes: re-educating the gaze, the heart.
11. Culture of sustainability: broadening our point of view.

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<sup>128</sup> Earth Charter Commission, ‘The Earth Charter’ (1992), <https://earthcharter.org/read-the-earth-charter/download-the-charter/>.

<sup>129</sup> United Nations General Assembly, ‘Report of the United Nations Conference on Environment and Development (Rio de Janeiro, 3-14 June 1992), Annex I: Rio Declaration on Environment and Development’, Pub. L. No. A/CONF.151/26 (1992), [https://www.un.org/en/development/desa/population/migration/generalassembly/docs/globalcompact/A\\_CONF.151\\_26\\_Vol.I\\_Declaration.pdf](https://www.un.org/en/development/desa/population/migration/generalassembly/docs/globalcompact/A_CONF.151_26_Vol.I_Declaration.pdf).

<sup>130</sup> Gadotti, *A Carta da Terra na educação*, 15–16.

<sup>131</sup> Gadotti, 20.

<sup>132</sup> Gadotti, 20.

Additionally, the Instituto Paulo Freire leads the ‘Movimento pela Carta da Terra’ [Earth Charter Movement], which, among its networking goals, includes contributions “to the systematic processing of ecopedagogy in formal and non-formal educational settings.”<sup>133</sup>

According to Gadotti,<sup>134</sup> ecopedagogy was initially understood by Gutiérrez and Prado as “education for sustainable development.”<sup>135</sup> Later, they adopted the expression “biopedagogy” to embrace a more spiritual perspective.<sup>136</sup> Gadotti’s current understanding of ecopedagogy is universalistic:

“[It is the only] alternative global project where the concern is not only with the preservation of nature (natural ecology) nor the impact of human societies on natural environments (social ecology), but with a new model of civilization that is sustainable from an ecological point of view (integral ecology) which implies a change in economic, social and cultural structures. It is therefore linked to a *utopian project*: to change the human, social and environmental relationships that we have today.”<sup>137</sup>

Thus, the ultimate goal of ecopedagogy is to bring change at the individual, communal, curricular, and political level in order to promote a new world citizenry, which is mindful of both natural and social sustainability and of the challenges posed by the current state of humanity.<sup>138</sup> Additionally, ecopedagogy aims to foster prosocial communal values, such as “networking,” “mutual trust,” and “altruism.”<sup>139</sup>

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<sup>133</sup> Gadotti, 24.

<sup>134</sup> Gadotti, 41.

<sup>135</sup> Francisco Gutiérrez, *Pedagogia Para El Desarrollo Sostenible* (Heredia, Costa Rica: Editorialpec, 1994).

<sup>136</sup> Cruz Prado, ‘Biopedagogia’, in *Sendas de Freire: opresiones, resistencias y emancipaciones en un nuevo paradigma de vida*, ed. Pep Aparício Guadas et al. (Fórum Paulo Freire – V Encuentro Internacional, Xátiva: Institut Paulo Freire de España y Crec, 2006), 169–211.

<sup>137</sup> Gadotti, *A Carta da Terra na educação*, 42; For an extensive review of the relevance of utopias, see Rita Minello and Andrea Mattia Marcelli, ‘Dalle utopie alle città che apprendono come ecosistema: Da una rilettura della Città del Sole di Campanella’, *Formazione & insegnamento* 20, no. 1 Tome I (30 April 2022): 010–022, [https://doi.org/10.7346/-fei-XX-01-22\\_02](https://doi.org/10.7346/-fei-XX-01-22_02).

<sup>138</sup> Gadotti, *A Carta da Terra na educação*, 43–49.

<sup>139</sup> Gadotti, 51–55.

Halal remarks that ecopedagogy is inherently informal or non-formal, inasmuch it does not conceive of itself as belonging to schooling, but it recognises schooling as an opportunity to create educational settings.<sup>140</sup> However, given the breadth of its scope, the determination of the most appropriate means of interventions is left to educators and research participant. In this respect, Halal lists two types of ecopedagogical applications.<sup>141</sup> The first one is the teaching of ecopedagogy at school, which could take either the shape of a project or of a subject integrated with the curriculum.<sup>142</sup> The second one is the creation of inclusive initiatives of cooperation and networking aimed at tackling global issues.<sup>143</sup>

The issue with Halal's typology is that she treats ecopedagogy as an object of education, rather than as a method. This means that she recommends ecopedagogy is adopted as an attitude but, as such, it should be featured in the curriculum not as a set of guidelines for educators but as something that should be delivered to learners. On a different note, drawing on pre-existing literature, she suggests the adoption of an "ecopedagogical culture" in networking and international relations, let alone firms and business activities. Instead, however, it appears that ecopedagogy aims at teaching something that is not even a competence but a way of thinking—and this is corroborated by Gadotti's insistence on teacher training.<sup>144</sup>

Misiaszek argues that, to better understand ecopedagogy's way of working, the notion of "critique" should be taken into account.<sup>145</sup> Although Gadotti claims that, in principle,

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<sup>140</sup> Christine Yates Halal, 'Ecopedagogia: Uma nova educação', *Revista de Educação* 12, no. 14 (2009): 95.

<sup>141</sup> Halal, 99–100.

<sup>142</sup> Halal, 99–100.

<sup>143</sup> Halal, 100.

<sup>144</sup> Gadotti, *A Carta da Terra na educação*, 7, 21–22, 33.

<sup>145</sup> Greg William Misiaszek, 'Ecopedagogy and Citizenship in the Age of Globalisation: Connections Between Environmental and Global Citizenship Education to Save the Planet',

ecopedagogy is not opposed to environmental education,<sup>146</sup> criticism is applied whenever environmental education produces changes that support sustainable uses of resources but ‘hurt’ the Planet—however counterintuitive this might sound.

Talking of ‘hurting the Planet’ is meaningless if we do not adopt the ecopedagogists’ view that Earth is a moral subject and, as such, it is vulnerable. For example, environmental education could teach human beings how to exploit Earth’s resources with minimum waste, yet without worrying about whether it would constitute a form of oppression of the Planet. In anthropocentric terms, a project could be environmentally-savvy and yet promote exploitation and hegemony. Ecopedagogists argue that, even though at surface level such education is ‘environmental,’ it is not authentically sustainable. To the proponents of environmentally conscious systems of exploitation, ecopedagogists ask the following smoral question: is this right?

Conversely, as Misiaszek seems to suggest,<sup>147</sup> environmental education could promote sustainable outcomes but without pushing for a critique of the *status quo*. In this sense, there are several examples of human communities that live in a sustainable way but do not engage in fair practices with regards to its individual members. An example could be that of a community that lives ‘in harmony’ with nature but where sexism is rampant. In such case, ecopedagogists could argue that being ‘in harmony’ with the surrounding non-human environment is not authentic ‘harmony,’ especially if some members of the community are exploited, oppressed, and subject to levels of stress and unhappiness that are objectively measurable.

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*European Journal of Education* 50, no. 3 (September 2015): 280, <https://doi.org/10.1111/ejed.12138>.

<sup>146</sup> Gadotti, *A Carta da Terra na educação*, 44.

<sup>147</sup> Misiaszek, ‘Ecopedagogy and Citizenship in the Age of Globalisation’, 281.



Drawing on Misiaszek, ecopedagogy unfolds along the following axes:

- The need to “learn socio-environmental perspectives and traditions that are different from our own”<sup>148</sup>
- The importance of respecting “local knowledge and values in order to determine the socio-environmental issues that individuals should focus on and the resources to be used in the process.”<sup>149</sup>
- The adoption of “bottom-up pedagogical constructions”<sup>150</sup>
- “Democratisation of the learning processes,” which entails facilitating learners’ expression of “their own understanding and actions”<sup>151</sup>
- Attention to globalization processes, understood in a bi-directional way.<sup>152</sup>
- Open-minded attitude towards the investigated processes—that is, by rejecting *a priori* biases (such as: ‘technology is inherently bad’).<sup>153</sup>

As it will be made evident in *Chapters 6* and *7*, fieldwork has found an excellent candidate for such type of ecopedagogical recognition: that is, the cultural heritage phenomenon of the Terceira Island’s Carnival (Azores Autonomous Region, Portugal). Here, I will not anticipate the Carnival’s merits facing ecopedagogy, yet it really appears, to the untrained eye, like a case of democratised process that pays attention to global dynamics and tackles them with an open-minded attitude. However, one thing is ‘looking like it,’ and another thing is ‘being it.’ This dissertation will endeavour to prove that that is the case.

### 2.3.2. *Ecopedagogy and the notion of ecosystems in education science*

To tackle environmental concerns, it is useful to draw on concepts that have historically entertained strong ties with the notion of ‘environment.’ However, in doing so, I will attempt to conflate my conceptual repertoire rather than expanding it. The goal is that of conceptual—thus, epistemological—integration rather than the proliferation of scholarly

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<sup>148</sup> Misiaszek, 282.

<sup>149</sup> Misiaszek, 282.

<sup>150</sup> Misiaszek, 282.

<sup>151</sup> Misiaszek, 283.

<sup>152</sup> Misiaszek, 284.

<sup>153</sup> Misiaszek, 284.

notions and criteria as if they were additional boxes to tick. Hence, I will address the concept of ‘ecosystem,’ which is at the core of different environmental approaches to science.

The notion of ‘ecosystem’ has of late become a prominent element in explanations by educational scientists. Reference to ‘ecosystems’ is not an attempt at biologizing pedagogy; rather, it represents an effort to understand that explanations are valuable only when they take into account the integrated nature of competing and cooperating elements, which fuel educational processes, processes of growth, and other similar phenomena. Attention to the integration of different processual elements is not just a pedagogical trend, but stems from comprehensive political directions—which, in turn, derive their prescriptions from a grasp of the way current society is changing.<sup>154</sup>

1. A first appreciation of educational ecosystems occurs in didactic, which has always been concerned with the creation of appropriate educational “habitats.”<sup>155</sup> Thus, “pedagogical ecosystems” are understood as the ontological dimension in which education takes place.<sup>156</sup>

2. Secondly, ecosystems and learning habitats become a priority when digital education is involved, together with nowadays’ processes of gamification. In fact, whenever digital technologies are involved, the design of an appropriate learning environment is pivotal, inasmuch design faults return negative learning outputs. Some examples of such kind of research are: Mohammed, who focuses on language learning;<sup>157</sup> Stigall and Sharma, who work on gamification as a way to improve the

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<sup>154</sup> See, e.g., Klaus Schwab, *The Fourth Industrial Revolution*, First U.S. edition (New York: Crown Business, 2016).

<sup>155</sup> Angela Jones and Rebecca Bennett, ‘Reaching beyond an Online/Offline Divide: Invoking the Rhizome in Higher Education Course Design’, *Technology, Pedagogy and Education* 26, no. 2 (15 March 2017): 193–210, <https://doi.org/10.1080/1475939X.2016.1201527>; See also Malcolm Tight, ‘Research on Course Design’, in *Higher Education Research: The Developing Field* (London New York Oxford: Bloomsbury Academic, 2019), 35–50.

<sup>156</sup> Judith Good, ‘Serving Students with Special Needs Better: How Digital Technology Can Help’, in *OECD Digital Education Outlook 2021: Pushing the Frontiers with Artificial Intelligence, Blockchain and Robots*, ed. OECD, OECD Digital Education Outlook (Paris: OECD, 2021), 123–42, <https://doi.org/10.1787/589b283f-en>.

<sup>157</sup> Dalia Ali Maher Abbass Mohammed, ‘Using A Mobile-Assisted Language Learning-Based Program on Improving Second Year English Majors’ Conversational Academic Acquisition and Autonomy’, *Journal of Arabic Studies in Education & Psychology(ASEP)* 71, no. 2 (1 October 2016): 365–424, <https://doi.org/10.21608/saep.2016.56322>.

teaching of data structure;<sup>158</sup> Abichandani et al. and Gonzalez Lopez et al., who apply virtual reality to the teaching of skills for the energy industry.<sup>159</sup>

3. Thirdly, the notion of “ecosystem” could be used to understand the embeddedness of entire educational institutions. Here, “ecosystem” replaces the exhausted concept of ‘territory.’ The latter is too tightly related to physical geography and, as such, it is unable to cross through the overlapping layers of current society, which is interconnected thanks to communication technologies. Such usage of “ecosystem” to analyse institutions is employed, for example, by Clark.<sup>160</sup>

4. Finally, the understanding of educational ecosystems helps researchers, managers, and other decision-makers to fine-tune aspects of the learning process that fall without the limited scope of their official appointments. In fact, after understanding the key role of extra-curricular experiences, school managers and educators are increasingly prompted to reach out to other actors and stakeholders in order to fulfil their duties; and, even when they are not willing to do so, motivation comes from increasingly complex policy documents. For example, even if Italy is a late comer to the idea,<sup>161</sup> it began to promote the need for integrated system with a series of national guidelines concerning early childhood education (including kindergarten and pre-school): *Sistema integrato 0–6*.<sup>162</sup> Formalised or not, educational ecosystems offer “sociocultural affordances” that could be regarded as “vital” for the learning process.<sup>163</sup>

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<sup>158</sup> James Stigall and Sharad Sharma, ‘Usability and Learning Effectiveness of Game-Themed Instructional (GTI) Module for Teaching Stacks and Queues’, in *SoutheastCon 2018* (SoutheastCon 2018, St. Petersburg, FL: IEEE, 2018), 1–6, <https://doi.org/10.1109/SECON.2018.8479132>.

<sup>159</sup> Pramod Abichandani et al., ‘Solar Energy Education Through a Cloud-Based Desktop Virtual Reality System’, *IEEE Access* 7 (2019): 147081–93, <https://doi.org/10.1109/ACCESS.2019.2945700>; Juan Miguel Gonzalez Lopez et al., ‘Incorporating Virtual Reality into the Teaching and Training of Grid-Tie Photovoltaic Power Plants Design’, *Applied Sciences* 9, no. 21 (23 October 2019): 4480, <https://doi.org/10.3390/app9214480>.

<sup>160</sup> Marina C. Clark, ‘Perseverance: Facilitating Leadership and Meaningful School Improvement’ (Lethbridge, Alberta, University of Lethbridge, 2014), <https://www.ulethbridge.ca/sites/default/files/Clark%2c%20Marina.pdf>.

<sup>161</sup> Academic recommendations for a fully integrated system date back at least 1997, with the seminal contribution of Frabboni. See Franco Frabboni, ‘Mettiamo in rete le agenzie intenzionalmente formative: verso un sistema formative integrato’, in *Il processo formativo tra storia e prassi: materiali d’indagine*, ed. Franco Cambi and Paolo Orefice (Napoli: Liguori, 1997), 135–79.

<sup>162</sup> Presidente della Repubblica, ‘Decreto Legislativo 13 Aprile 2017 n. 65: Istituzione del sistema integrato di educazione e di istruzione dalla nascita sino a sei anni, a norma dell’articolo 1, commi 180 e 181, lettera e), della legge 13 luglio 2015, n. 107’, *Gazzetta Ufficiale della Repubblica Italiana (GU)*, Supplemento Ordinario (Ministero della Giustizia – Ufficio Pubblicazione Leggi e Decreti, 2017), <https://www.gazzettaufficiale.it/eli/id/2017/05/16/17G00073/sg>.

<sup>163</sup> See María Eugenia Lozano, Juan Pablo Jiménez-Caicedo, and Lee B. Abraham, ‘Linguistic Landscape Projects in Language Teaching: Opportunities for Critical Language

From a semantic point of view, the usage of the prefix “eco-” could be questioned. After all, would not it be sufficient to talk of “systems”? In this regard, the answer is manifold.

[a] As observed by Mayo, without such prefix there would be less grounds for the acceptance of radical stances (e.g.: towards the safeguard of the environment).<sup>164</sup>

[b] Moreover, as anticipated above, the notion of ‘integratedness’ is borrowed from ecology, which is the science that, to the eyes of pedagogists, boasts the greatest breakthrough in this sense.

[c] By adopting the “eco-” prefix, researchers distance themselves from cognitive-behavioural brands of accelerationism, which might advocate the creation of functioning systems “at all costs.”<sup>165</sup> Such type of accelerationism is more of a strawman (or scarecrow) than not, but the challenge it represents contributes more to the positioning of “eco-friendly” educational science than to its existence as a research programme of its own.

[d] Finally, as furtherly advocated by Mayo, the study of educational systems should not be kept apart from the discourse on sustainability, which shapes most of the

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Learning Beyond the Classroom’, in *Language Teaching in the Linguistic Landscape*, ed. David Malinowski, Hiram H. Maxim, and Sébastien Dubreil, vol. 49, *Educational Linguistics* (Cham: Springer International Publishing, 2020), 24, [https://doi.org/10.1007/978-3-030-55761-4\\_2](https://doi.org/10.1007/978-3-030-55761-4_2).

<sup>164</sup> Peter Mayo, ‘Remaining on the Same Side of the River: A Critical Commentary on Paulo Freire’s Later Work’, *Review of Education, Pedagogy, and Cultural Studies* 22, no. 4 (January 2000): 369–97, <https://doi.org/10.1080/1071441000220404>.

<sup>165</sup> In her thesis, drawing on an unpublished work by Albert, Mohorcich explains accelerationism together with other neorationalist trends. In doing so, he aims to provide cognitive maps of society that reflect its complexity and make it “intelligible” in order to help decision-makers. The term “accelerationism” is borrowed from Williams and Srnicek’s homonymous 2013 *Manifesto*. Notably, the latter share many points in common with ecopedagogy, exception made for the fact they advocate an utter and complete reform of current means of existence, with specific focus on the political and economic stage. The accelerationist infrastructure of Williams and Srnicek makes room for local action, but eventually regards its outcomes as temporary and ineffective. Therefore, notwithstanding the accelerationists’ longing for a post-capitalist society, they do offer no options to the local school manager or educator. See: Michael Albert, ‘Praxis, Technology, Hegemony: The Challenge of Left Accelerationism’ (Unpublished manuscript, 2017); Joseph Mohorčich, ‘Power Pragmatism’ (John Hopkins University, 2017), 10, <http://jhir.library.jhu.edu/handle/1774.2/60896>; Alex Williams and Nick Srnicek, ‘#ACCELERATE MANIFESTO for an Accelerationist Politics’, Academic website, *Critical Legal Thinking* (blog), 14 May 2013, <https://criticallegalthinking.com/2013/05/14/accelerate-manifesto-for-an-accelerationist-politics/>.

current public debate—as of 2021.<sup>166</sup> Namely, Pérez-Jorge et al. think environmentalism is the ultimate foundation of the teaching of ethics.<sup>167</sup>

The latter point shaped a pedagogical trend that is now living through its third decade. As anticipated above, it was originally promoted by Gadotti under the label of “ecopedagogy,”<sup>168</sup> which was furtherly developed by Mortari,<sup>169</sup> and Gutierrez and Prado.<sup>170</sup> Although it originally stressed on environmental education,<sup>171</sup> ecopedagogy aims to overcome anthropocentrism<sup>172</sup> and to integrate education not just with environmentalism but also with a

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<sup>166</sup> Mayo, ‘Remaining on the Same Side of the River’, 391.

<sup>167</sup> David Pérez-Jorge et al., ‘Environmental Education as a Key Element for Values Education’, *British Journal of Education, Society & Behavioural Science* 16, no. 3 (10 January 2016): 1–8, <https://doi.org/10.9734/BJESBS/2016/26527>.

<sup>168</sup> Moacir Gadotti, ‘A praxis politico-pedagógica de Paulo Freire no context educacional brasileiro’, in *Simpósio Paulo Freire, Vitória (ES), 04–06 de setembro de 1996* (Simpósio Paulo Freire, Vitória (ES), 04–06 de setembro de 1996, Vitória, Spain, 1996), 1–15, [http://acervo.paulofreire.org:8080/jspui/bitstream/7891/2998/1/FPF\\_PTPF\\_01\\_0365.pdf](http://acervo.paulofreire.org:8080/jspui/bitstream/7891/2998/1/FPF_PTPF_01_0365.pdf);

Moacir Gadotti, ‘LIÇÕES DE FREIRE’, *Revista Da Faculdade de Educação* 23, no. 1–2 (January 1997), <https://doi.org/10.1590/S0102-25551997000100002>; Moacir Gadotti, ‘Escola cidadã: Educação para e pela cidadania’, 2000, FPF\_PTPF\_13\_009, Centro de Referência Paulo Freire,

[http://acervo.paulofreire.org:8080/xmlui/bitstream/handle/7891/1645/FPF\\_PTPF\\_13\\_009.pdf](http://acervo.paulofreire.org:8080/xmlui/bitstream/handle/7891/1645/FPF_PTPF_13_009.pdf) ; Moacir Gadotti, ‘Perspectivas atuais da educação’, *Revista da Faculdade de Educação* 14, no. 2 (2000): 3–11; Moacir Gadotti, ‘Saber aprender: Um olhar sobre Paulo Freire e as perspectivas atuais da educação’, in *Um olhar sobre Paulo Freire, Congresso Internacional, Évora, 20 a 23 de setembro de 2000* (Um olhar sobre Paulo Freire, Congresso Internacional, Évora, 20 a 23 de setembro de 2000, Évora, Portugal, 2000), [http://www.acervo.paulofreire.org:8080/jspui/bitstream/7891/2999/1/FPF\\_PTPF\\_01\\_0366.pdf](http://www.acervo.paulofreire.org:8080/jspui/bitstream/7891/2999/1/FPF_PTPF_01_0366.pdf).

<sup>169</sup> Luigina Mortari, *Ecologicamente Pensando* (Milano: Unicopli, 1998); Luigina Mortari, *Per Una Pedagogia Ecologica* (Firenze: La Nuova Italia, 2001).

<sup>170</sup> Francisco Gutiérrez and Cruz Prado, *Ecopedagogia e cidadania planetária*, 1st ed. (Cortez Editora, 1999).

<sup>171</sup> Maria Ivete Soares de Almeida, ‘A emergência da educação ambiental no cenário mundial: evolução dos conceitos e concepções da educação ambiental’, *Boletim Goiano de Geografia* 20, no. 1 (9 July 2008): 19–42, <https://doi.org/10.5216/bgg.v20i1.4227>; Otacilia Matulaitis Wingeter, ‘Revendo conceitos e construindo valores: Uma abordagem de educação Ambiental baseada no estímulo da percepção’ (Master’s Thesis, Florianópolis, Universidade Federal de Santa Catarina, 2001), <http://repositorio.ufsc.br/xmlui/handle/123456789/79900>.

<sup>172</sup> Mayo, ‘Remaining on the Same Side of the River’.

renewed attention to quality of life.<sup>173</sup> This comprehensive understanding of ecopedagogy eventually shaped the educational discourse on sustainability, of which Malavasi is one the leading researchers.<sup>174</sup>

Accordingly, ecopedagogy's 'healthy holism' serves epistemological purposes that already belong to the broader field of Social Education. Namely, Gramigna identifies the scope of education with that "socialization:" education is inherently related to social change<sup>175</sup> and could be appropriately framed only within a pan-specific [all human species] understanding of social action;<sup>176</sup> and this is why an arena where the emancipation of individuals and communities is at odds with hegemonic powers that attempt at preserving the *status quo*—which is a recurrent theme in Freire's writings.<sup>177</sup>

Hence, ecopedagogy, when understood in an ecosystemic perspective that accounts for integratedness, anti-accelerationism, and sustainability, constitutes a radical paradigm that

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<sup>173</sup> Ângela Antunes Ciseski et al., *Educação de Jovens e Adultos: Planejamento e Avaliação*, vol. 3, Programa SENAC-SP de Educação e Cidadania: Alfabetizando Jovens e Adultos (São Paulo: IPF/SENAC, 1999), <http://acervo.paulofreire.org:8080/xmlui/handle/7891/2090>; Sérgio R. Junqueira, 'ECOEDUCAÇÃO: um desafio permanente', *Revista Diálogo Educacional* 1, no. 2 (17 July 2000): 1, <https://doi.org/10.7213/rde.v1i2.3265>; Alice Akemi Yamasaki et al., *Educação de Jovens e Adultos: Uma Perspectiva Freireana*, vol. 2, Programa SENAC-SP de Educação e Cidadania: Alfabetizando Jovens e Adultos (São Paulo: IPF/SENAC, 1999), <http://acervo.paulofreire.org:8080/xmlui/handle/7891/2088>.

<sup>174</sup> Pierluigi Malavasi, 'Formazione e ricerca pedagogica per un'ecologia integrale: Prolegomeni', in *La ricerca pedagogica nell'Italia contemporanea: problemi e prospettive*, ed. Giuseppe Bertagna and Simonetta Ulivieri, Cultura studium. Nuova serie 105 (Roma: Studium, 2017); Pierluigi Malavasi, 'Pedagogia Dell'ambiente, Educazione Allo Sviluppo Sostenibile, Responsabilità Sociale', in *Pedagogia Dell'ambiente 2017: Tra Sviluppo Umano e Responsabilità Sociale*, ed. Maria Luisa Iavarone et al. (Lecce: Pensa MultiMedia, n.d.), 17–56; Pierluigi Malavasi, 'Ecologia integrale, economia circolare, educazione alla sostenibilità', in *Io corpo io racconto io emozione*, ed. Liliana Dozza (Bergamo: Zeroseiup, 2018), 139–51; Pierluigi Malavasi, 'Un green new deal per abitare la Terra: Educazione e sostenibilità', in *L'abitare come progetto, cura e responsabilità: aspetti epistemologici e progettuali*, ed. Cristina Birbes and Manuela Gallerani (Brescia: Zeroseiup, 2019), 125–28.

<sup>175</sup> Anita Gramigna, *Manuale di pedagogia sociale* (Roma: Armando, 2003), 38.

<sup>176</sup> Gramigna, 40; See also Edgar Morin, *I sette saperi necessari all'educazione del future* (Milano: Raffaello Cortina, 2001), 15–16.

<sup>177</sup> Gramigna, *Manuale di pedagogia sociale*, 38–39.

serves the purpose of education through inclusion. This echoes the previously addressed notion of peripheral inclusion, promoted by Lave and Wenger as a way to account for gradualism in *in situ* apprenticeships. Thus, it is the ‘eco’ view that better explains a community’s ability to deal with its periphery in a wise and sustainable way, which benefits both its members, its prospective members, and nature as a whole.

### 2.3.3. *Making epistemological ecosystems explicit: an example from heritage*

Given the relevance of the notion of ‘ecosystem’ in education science, a question is raised as per whether we should account for ‘epistemological ecosystems’ as well. Part of the answer has already been provided above, when a distinction was made between what is epistemologically relevant for the individual (e.g., a processual account of how knowing *works* for her) and what is epistemologically relevant for the community (e.g., a processual account of how science *works* for it).

Additionally, the notion of epistemological ecosystem poses a challenge to the researcher. In fact, if we draw on Misiaszek, we acknowledge the importance for ecopedagogical research to map heterogeneous educational ecosystems in order to enrich our knowledge and expand the scope of standard Westernized education science.<sup>178</sup> This is, in and by itself, a scientific goal worth pursuing. However, in doing so, investigative and interpretive techniques are deployed that carry with themselves their respective epistemological loads. Therefore, I argue it is paramount to clarify some aspects concerning the epistemological *a priori* of the ecopedagogical research reported in this text before moving on to analyse *specific* epistemologies that relate educational ecosystems as objects of investigation.

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<sup>178</sup> Misiaszek, ‘Ecopedagogy and Citizenship in the Age of Globalisation’.

The notion of “epistemological ecosystem” is less consolidated than that of “educational ecosystem”. St. Clair uses this expression to describe the shared conceptual environment of Nineteenth Century poets and philosophers—possibly with an implicit reference to Foucault, which is mentioned several times in her work but not specifically in relation to ecosystems.<sup>179</sup> This mirrors a previous attempt by Matoush, who dealt with ecosystems in her literary studies.<sup>180</sup> Hartman-Caverly’s conception of “epistemological ecosystem” is more encompassing, inasmuch it embraces all the agents, institutions and technologies involved in the management of information.<sup>181</sup> Outhwaite et al. relate “epistemological ecosystems” to “educational inquiry:”<sup>182</sup> together with Thomas, who is their main source,<sup>183</sup> they agree educational investigations cannot be reduced to randomized controlled trials because the over-reliance on controlled trials’ model of explanation stems from misunderstandings about the role of generalization in education science. This is a sensible remark because, as observed

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<sup>179</sup> Robert St. Clair, *Poetry, Politics, and the Body in Rimbaud*, vol. 1 (Oxford University Press, 2018), <https://doi.org/10.1093/oso/9780198826583.001.0001>.

<sup>180</sup> Marylou M Matoush, ‘Understanding the Power of Literacy: The Nature of an Emergent Epistemological Ecosystem from a Sociohistorical Perspective’ (PhD Thesis, University of Florida, 2004).

<sup>181</sup> Sarah Hartman-Caverly, “‘Truth Always Wins:’ Dispatches from the Information War”, in *Libraries Promoting Reflective Dialogue in a Time of Political Polarization*, ed. Andrea Baer, Ellysa Stern Cahoy, and Robert Schroeder (Chicago: Association of College and Research Libraries, 2019), 187–233.

<sup>182</sup> Laura A. Outhwaite, Anthea Gulliford, and Nicola J. Pitchford, ‘A New Methodological Approach for Evaluating the Impact of Educational Intervention Implementation on Learning Outcomes’, *International Journal of Research & Method in Education* 43, no. 3 (26 May 2020): 225–42, <https://doi.org/10.1080/1743727X.2019.1657081>.

<sup>183</sup> Gary Thomas, ‘After the Gold Rush: Questioning the “Gold Standard” and Reappraising the Status of Experiment and Randomized Controlled Trials in Education’, *Harvard Educational Review* 86, no. 3 (1 September 2016): 390–411, <https://doi.org/10.17763/1943-5045-86.3.390>.



by Paniagua, “epistemological ecosystems” are inherently non-linear,<sup>184</sup> which means at least two things:

- (a) that they cannot be fully grasped through bare-bone experimental designs.
- (b) that epistemological ecosystems cannot be regarded as disconnected from the educational ecosystems they support.

Furthermore, the non-linearity of epistemological ecosystems could contribute to a better understanding of non-Western (or: pre-modern; or: non-capitalist) heritage, as illustrated, for example, by the case of Mabingo’s work on dancing in indigenous contexts.<sup>185</sup>

Hence, what epistemological ecosystem could be featured in the current research? My claim is that there are at least *two*:

- (a) One is an object of inquiry, that is, the epistemological ecosystem entailed by the practices that will be targeted by my study.
- (b) Another one is the epistemological ecosystem that is *assumed* in order to shape the heuristics that will unfold during the investigative and analytic practice.

Whereas the former will emerge over the course of the research, the latter could be addressed immediately, to increase methodological transparency and prevent, as much as possible, the exercise of unconscious biases. This reiterates my previous call for a clarification of the core epistemological stances that could be embedded in my research.

To illustrate them, I will make reference to the concept of ‘*heritage*.’ So far, I have not addressed heritage as the subject of my inquiry but as a source of information concerning educational processes. Accordingly, I put forward the example of Terceira Island’s *touradas*. But talking of *touradas* in Terceira is the same as talking of heritage. In addition to that, I maintain the notion of ‘heritage’ is analytically tied to those of community inclusion (as the

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<sup>184</sup> Pablo Paniagua, ‘Money and the Emergence of Knowledge in Society’, *Review of Social Economy* 76, no. 1 (2 January 2018): 95–118, <https://doi.org/10.1080/00346764.2017.1423511>.

<sup>185</sup> Alfdaniels Mabingo, ‘Reimagining and Reimagining Indigenous Dances and Their Contexts of Practice in Postcolonial African Environments’, *Critical Arts* 35, no. 3 (4 May 2021): 52–68, <https://doi.org/10.1080/02560046.2021.1985155>.

intersection between practice and situatedness). That heritage could be functional to inclusion is acknowledged, for example, by Azzopardi et al. in their study on the integration of natural and cultural heritage.<sup>186</sup> Smith is more cautious and warns that “heritage-making is always fraught and contested. Indeed it is always political, not simply because its interpretation of history might be disputed, but because any assertion of inclusive heritage must also include an implicit assertion of exclusion.”<sup>187</sup> However, *contra* Smith I argue that her concern is either biased by a Hegelian binary analytical stance (inclusion always entails exclusion) or it is applicable to specific either/or scenarios, such as the ones she addresses in her paper. Instead, I argue that if we abide by Lave and Wenger’s gradualist notion of “peripheral inclusion,”<sup>188</sup> we can think of heritage as a porous reality rather than an island demarcated by clear-cut divides.

Another crucial point is that heritage functions thanks to living archives. Almeida and Hoyer argue “living archives” could shape communities through intergenerational transmission (i.e., education) and their participated update.<sup>189</sup> However, their idea is that of an explicit policy undertaken by a community, labelled “living archive.” Instead, my view is more sympathetic with what Lowry and MacNeil call the “expansive understanding of the nature of records” in

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<sup>186</sup> Elaine Azzopardi et al., ‘What Are Heritage Values? Integrating Natural and Cultural Heritage into Environmental Valuation’, *People and Nature*, 30 July 2022, 6, <https://doi.org/10.1002/pan3.10386>.

<sup>187</sup> Laurajane Smith, ‘Heritage, Identity, and Power’, in *Citizens, Civil Society, and Heritage-Making in Asia*, ed. Xinhuan Xiao et al. (Citizens, Civil Society, and the Cultural Politics of Heritage-Making in East and Southeast Asia Conference, Singapore: ISEAS Publishing co-published with Institute of Sociology, Academia Sinica, [and] International Institute for Asian Studies, 2017), 15–39.

<sup>188</sup> Lave and Wenger, *Situated Learning*, 34–36.

<sup>189</sup> Nora Almeida and Jen Hoyer, ‘Living Archive in the Anthropocene’, *Journal of Critical Library and Information Studies* 3, no. 1 (17 May 2020): 18, <https://doi.org/10.24242/jclis.v3i1.96>.

relation to Bastian’s and Ahmed’s contribution to archival science:<sup>190</sup> all heritage is supported by memory practices, except that some of them might enjoy higher or lower degrees of explicitness, as well as higher or lower degrees of materiality.

Drawing on the above considerations, epistemological *a priori* concerning the notion of heritage could be outlined as follows:

1. Firstly, heritage is underpinned by a merging of both material and intangible (immaterial) elements. An example thereof is provided by Swaminathan, whose project had the outcome of “converting a sea view into an epistemology”:<sup>191</sup> the conversion of a “sea view” into a “sea gaze” sidesteps the well-entrenched analytical foundation of cultural studies, which assumes “material foundations” and “cultural productions” are two distinct layers of a given society.<sup>192</sup> “Mindscapes” and “landscapes” are merged, and ideal elements retain their physical anchoring, while physical presentations trigger cultural affordances to produce representations.<sup>193</sup>
2. Secondly, heritage is class-sensitive, income-sensitive, etc. In other words, it is background-sensitive. For example, Swaminathan collected testimonies from sea and river users and was able to identify how the social segment they belong to is reflected in the way the concept of sea is construed.<sup>194</sup>
3. Thirdly, cultural heritage exposition and understanding allows for an appreciation of non-orthodox worldviews (as formerly recommended by Misiaszek)—which is a long-lasting theme of ethnographic research in general. For example, in his study of the Woodlands Cree of Nēhîhâwâk [Reindeer Lake] Michell discovered his target community developed guiding concepts and thinking patterns that shape their decision-making practices.<sup>195</sup> Namely, their worldview is holistic and assumes every connection (either socially pursued, merely perceived or contingent) is saturated with

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<sup>190</sup> Sumayya Ahmed, ‘People of Remembrance: Archival Thinking and Religious Memory in Sufi Communities’, *Archival Science* 21, no. 1 (March 2021): 9–23, <https://doi.org/10.1007/s10502-020-09346-9>; Jeannette A. Bastian, ‘Mine, Yours, Ours: Archival Custody from Transaction to Narrative’, *Archival Science* 21, no. 1 (March 2021): 25–42, <https://doi.org/10.1007/s10502-020-09341-0>; James Lowry and Heather MacNeil, ‘Archival Thinking: Archaeologies and Genealogies’, *Archival Science* 21, no. 1 (March 2021): 1–8, <https://doi.org/10.1007/s10502-020-09355-8>.

<sup>191</sup> Ramanathan Swaminathan, ‘The Epistemology of a Sea View: Mindscapes of Space, Power and Value in Mumbai’, *Island Studies Journal* 9, no. 2 (2014): 286, <https://doi.org/10.24043/isj.306>.

<sup>192</sup> Swaminathan, 287.

<sup>193</sup> Swaminathan, 287.

<sup>194</sup> Swaminathan, 288.

<sup>195</sup> Herman Michell, ‘Nēhîhâwâk of Reindeer Lake, Canada: Worldview, Epistemology and Relationships with the Natural World’, *The Australian Journal of Indigenous Education* 34, no. 1 (1 December 2005): 35, <https://doi.org/10.1017/S132601110000394X>.

sacred energy.<sup>196</sup> In turn, given their acceptance of manifold interpretations of reality, the Woodlands Cree’s belief system is at the same time resilient and welcoming, and always steers towards the direction of ideological conflict resolution.<sup>197</sup> This attitude, paired with the Woodlands Cree’s hands-on approach to learning, makes it almost impossible for education to be delivered through textbooks or standard sets of language assertions.<sup>198</sup> Non-orthodox epistemologies do not only fulfil the critical aim of education science but they do also provide a valuable framework for an “ecological” understanding of reality—which begs the issue ecopedagogy that was raised earlier: that is, how to develop a comprehensive view in face of analytical reductionism. Indigenous epistemologies, local epistemologies, and the like are valuable not just because their inclusion makes for a more democratic educational research, but also because they are better equipped at fulfilling the goals of ecopedagogy. For example, in his review of the Dewey Decimal Classification system Matsuda discovered Hawaiian culture is ill-represented, and usually framed within old-fashioned “colonial” categories: this is potentially a loss of heritage because the meaning of practices and artefacts are not conveyable unless they are placed in an appropriate context—including a classificatory networks, which need to be reworked in order to make room for alternative worldviews.<sup>199</sup>

In the above points a recurrent trend is the idea that it is not artefacts or practices *per se* that perpetuate heritage, but rather the upkeep of a cultural network of workable affordances, which is usually ranked under the label of ‘indigenous worldview’ or ‘indigenous epistemology’.<sup>200</sup> This appears like a revival of Lévy-Bruhl’s notion of “primitive mentality”<sup>201</sup> but with a twist: this stance claims that there are, indeed, patterns of thought that are common to given sociocultural contexts, but that they cannot be framed within a seemingly evolutionary conception of humanity, in which culture ‘progresses’ in fixed stages.

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<sup>196</sup> Michell, 36.

<sup>197</sup> Michell, 36.

<sup>198</sup> Michell, 36–37.

<sup>199</sup> Shavonn-Haevyn Matsuda, ‘Decolonizing Knowledge Organization Systems: Hawaiian Epistemology, Representation and Organization’, *Advances in Classification Research Online* 28, no. 1 (16 April 2019): 4, <https://doi.org/10.7152/acro.v28i1.15391>.

<sup>200</sup> The latter expression is more common when the investigator is more oriented towards knowledge studies.

<sup>201</sup> Lucien Lévy-Bruhl, *La mentalité primitive*, 3rd ed. (Paris: F. Alcan, 1925); For the English edition, see Lucien Lévy-Bruhl, *La Mentalité Primitive*, Herbert Spencer Lecture (Oxford (UK): Clarendon Press, 1931).

## 2.4. Can ecopedagogy be understood as a genealogy of heritage?

### 2.4.1. Wrap-up

It is now time to wrap up some of the milestones of the previous paragraphs. Theoretical reflection began to wonder about the nature of well-established categories in education: those of ‘formal,’ ‘non-formal,’ and ‘informal’ education. Critique of Dib’s work on such concepts<sup>202</sup> led to an appreciation of how the very idea of formal *versus* informal education emerged as a consequence of historical processes that could be subsumed under the label of ‘modernism,’ and which are characterized by growing European hegemony, unbound colonialism, statism, and an attempt to shape society according to a bourgeois perspective. Notwithstanding Dib’s compelling points, we eventually sided with Mahoney, who was able to show that the degree of ‘formalism in education is more of an attitude rather than a specific institutional set up.’<sup>203</sup>

Thoughts concerning different degrees of formalism in education led us to consider Strauss’ taxonomy as a possible way to overcome their limits.<sup>204</sup> Strauss’ view is appealing, because it makes room for an intercultural appreciation of the educational phenomenon and is able to place institutionalization within the broader frame of intentionality.<sup>205</sup> However, Strauss’ account is too mentalistic and is challenged by the need to account for supra-individual elements in education. Fieldwork observations suggest that the contextual and situated elements of education cannot be understood through the individual and mentalistic notion of ‘intentionality.’

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<sup>202</sup> Dib, ‘Formal, Non-Formal and Informal Education’.

<sup>203</sup> Mahoney, ‘What Is Informal Education?’

<sup>204</sup> Strauss, ‘Beyond “Formal” versus “Informal” Education: Uses of Psychological Theory in Anthropological Research’.

<sup>205</sup> Strauss.

A first solution to this issue is brought about by the work of Bronfenbrenner and Evans.<sup>206</sup> Their “bioecological developmental model” accounts for contextual elements such as culture and treats them as factors that affect the individual at the micro-level, that is, by manifesting themselves within her monadic bubble. However, Vélez-Agosto et al. contend that Bronfenbrenner and Evans’ model still deals with culture as something ‘external,’ which the model accounts for as an element that objectively affects the individual rather than a medium the individual is involved with.<sup>207</sup> I argued that both groups of scholars make compelling points: Bronfenbrenner and Evans are correct when they think that cultural elements are often external to the individual, and act in ways the individual cannot control; however, even Vélez-Agosto et al. are correct when they claim that somehow such elements are closer to the individual than we might think.

Therefore, considering the above conundrum, I proposed to focus on communities. In other words, we operate a little revolution and start conceiving of communities as the subjects of educational processes, rather than individuals—who, instead, experience learning processes. The best framework to do so is that of Lave and Wenger.<sup>208</sup> Lave and Wenger speak of “peripheral participation” as a way to account for different degrees in individuals’ inclusion in a community of practice. Their view is shaped by ethnographic research and moves beyond Westernized conceptions such as those related to the concept of ‘formal education.’ Given their concern for how new learners place themselves at the periphery of communities, I found it surprising that Lave and Wenger’s early work does not make heavy reference to

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<sup>206</sup> Bronfenbrenner and Evans, ‘Developmental Science in the 21<sup>st</sup> Century: Emerging Questions, Theoretical Models, Research Designs and Empirical Findings’.

<sup>207</sup> Vélez-Agosto et al., ‘Bronfenbrenner’s Bioecological Theory Revision’.

<sup>208</sup> Lave and Wenger, *Situated Learning*.

Vygotsky's notion of Zone of Proximal Development. In a sense, I argue, they endeavoured to identify the equivalent for communities of what Vygotsky predicates of the individual.

Notwithstanding the above, I proceeded with Ovando's actualization of Lave and Wenger's work, which summarises peripheral participation as a blend of domain-relevant knowledge, the establishment of relationships, and the sharing of a repertoire.<sup>209</sup> The way Ovando describes it, Lave and Wenger's communities look like they are grounded on strong heritage practices.

Subsequently, I wondered how Lave and Wenger's approach could be operationalized in education science. This led me to consider the principles of education science as a social science. A *Manifesto* for the latter has been put forward by Clifford,<sup>210</sup> and I tried to show it is the case for education science.<sup>211</sup> However, here I have recommended to conflate the four branches of his "Greater Humanities" into two more functional concepts: instead of talking of realism and history, we shall talk of situatedness; analogously, instead of talking of hermeneutics and ethics, we shall talk of practice. The rationale behind this is that, when such concepts are operationalized, it is easier (albeit reductive) to work with two categories rather than one in terms of degrees of freedom.

Once the notions of situatedness and practice have been established as the guiding notions of my research, I tried to find an appropriate scale that could help me categorize empirical observations. In the case of situatedness, I proposed to use the continuum between negotiability and non-negotiability: the advantage of using such continuum is that it is non-mentalistic, takes into consideration resource expenditure, and is heavily affected by contingencies. In the case of practice, I could not find an appropriate continuum; however, I

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<sup>209</sup> Ovando, 'Why Learn in Isolation When We Can Learn in a Community of Practice?'

<sup>210</sup> Clifford, 'The Greater Humanities'.

<sup>211</sup> Marcelli, 'Greater Humanities for Education'.

noticed that practices can be more or less organized and that, at a supra-individual level, they are enacted by what Foucault—and Bussolini with him—would call “apparatuses.”<sup>212</sup>

At that stage, I began to inquire how situatedness and practice—together with their twin operationalizing concepts of negotiability and apparatus complexity—could be framed within a broader educational paradigm. I have found that the best educational paradigm, in this sense, is that of ecopedagogy. I gave an account of ecopedagogy in light of the early proposals of Gutiérrez and Prado<sup>213</sup> and Gadotti,<sup>214</sup> however, to such framework, I added what we could dub ‘Misiaszek’s ethnographic concern’—that is, the idea that ecopedagogy, as the guiding paradigm of education science, should strive to retrieve non-orthodox practices that contribute to breaking the chains of current educational stereotypes.<sup>215</sup> In a sense, much like Lave and Wenger’s ‘apprentices’ place themselves at the periphery to learn more, the ecopedagogical researcher shall place herself at the periphery to discover new practices. Embracing ecopedagogy means reflecting on some key concepts of ecopedagogical thought and understand their epistemological *a priori*.

First, I asked why ecopedagogy should be ‘eco-’ and what contribution could come from the notion of ‘ecosystem.’ The answer to this issue is provided by Mayo: the ‘eco-’ prefix is radical, speaks of interrelatedness, is anti-accelerationist, and stresses on sustainability at all levels (not just environmental sustainability).<sup>216</sup>

Second, I asked whether we should speak of ‘epistemological ecosystems’ instead of ‘educational ecosystems.’ The answer is that the two are tied, except that epistemological ecosystem enjoy some sort of priority because they could be acting upon the researcher as

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<sup>212</sup> Bussolini, ‘What Is a Dispositive?’

<sup>213</sup> Gutiérrez and Prado, *Ecopedagogia e cidadania planetária*.

<sup>214</sup> Gadotti, *A Carta da Terra na educação*.

<sup>215</sup> Misiaszek, ‘Ecopedagogy and Citizenship in the Age of Globalisation’.

<sup>216</sup> Mayo, ‘Remaining on the Same Side of the River’.



well, whereas ‘educational ecosystems’ are usually predicated of the target of the research (e.g., a given community).

This latter point led me to analyse the concept of ‘heritage’ in light of epistemological ecosystem analysis. In fact, although I had not addressed it explicitly, my early examples all related to community heritage. To defuse potential biases, I clarified that ‘heritage,’ here, is to be understood as both material and immaterial. Additionally, drawing on the studies of Matsuda, Michell, and Swaminathan, I showed that it is possible to understand heritage as an archive that encompasses a set of epistemological principles that guide native knowledge acquisition, negotiation of environmental constraints, and overall community education.<sup>217</sup>

#### *2.4.2. Heritage and education: being mindful of power games*

The study of McCarter and Gavin further substantiates the latter point. McCarter and Gavin triangulated data from educators, experts, and officials to understand what role “traditional ecological knowledge (TEK)” might play in formal curricula.<sup>218</sup> According to their informants, formal curricula are the best place to teach TEK, which ought to be embedded in the national formal curriculum. Its inclusion in formal schooling could also serve the purpose of perpetuating the heritage it represents. However, the island they worked on is so diverse, both ecologically and culturally, that the creation of deliverable teaching formats might reduce traditional knowledge to a standard, thus impoverishing it.

It follows that the educational researcher is always at odds with heritage, especially when it comes to crafting toolkits and instruments to counter some perceived educational poverty.

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<sup>217</sup> Matsuda, ‘Decolonizing Knowledge Organization Systems’; Michell, ‘Nēhîhîwâk of Reindeer Lake, Canada’; Swaminathan, ‘The Epistemology of a Sea View’.

<sup>218</sup> Joe McCarter and Michael C Gavin, ‘Perceptions of the Value of Traditional Ecological Knowledge to Formal School Curricula: Opportunities and Challenges from Malekula Island, Vanuatu’, *Journal of Ethnobiology and Ethnomedicine* 7, no. 1 (December 2011): 38, <https://doi.org/10.1186/1746-4269-7-38>.

For example, as remarked by Dahlstedt and Fejes, the 1994 *Swedish National Curriculum* determined a shift towards individualism: the “understanding [of] one’s own ‘cultural heritage’” is now aimed at supporting oneself and becoming responsible for oneself.<sup>219</sup> As the authors put it:

“Such a conception of responsibility differs from the one found in previous curriculums, by shifting the focus from the collective to the individual, where the individual is conceptualised as part of certain communities of values, rather than as part of certain societal collectives, sharing common interests as members of these.”<sup>220</sup>

The above example is drawn on a highly institutionalized context, in which heritage policies are delivered in a top-down fashion. However, it should serve as a warning about the fact heritage is far from being a ‘neutral’ component in education—and there is no exception in ecopedagogy. Much like McCarter and Gavin’s ‘natives,’ the Swedish people are affected by the introduction of curricular changes.

To a good extent, Gosart demonstrated that ‘heritage’—and ‘cultural heritage’ in particular—are functional concepts to the Western appropriation of native knowledge.<sup>221</sup> On a similar note, Hafstein remarked that demarcation of heritage and natives’ rights to it are functional to exploitation on behalf of third party with an interest in knowledge or heritage use and commercialization.<sup>222</sup>

Therefore, considering the above concerns, I argue the mapping of heritage in an ecopedagogical perspective should be paired with an approach that is mindful of power

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<sup>219</sup> Magnus Dahlstedt and Andreas Fejes, ‘Shaping Entrepreneurial Citizens: A Genealogy of Entrepreneurship Education in Sweden’, *Critical Studies in Education* 60, no. 4 (2 October 2019): 462–76, <https://doi.org/10.1080/17508487.2017.1303525>.

<sup>220</sup> Dahlstedt and Fejes, 470.

<sup>221</sup> See, e.g., Julia Gosart, ‘The Protection of the Traditional Knowledge of Indigenous Peoples’ (Los Angeles, University of California, 2014), <https://www.proquest.com/dissertations-theses/protection-traditional-knowledge-indigenous/docview/1506429717/se-2?accountid=14610>.

<sup>222</sup> Valdimar Tr Hafstein, ‘The Politics of Origins: Collective Creation Revisited’, *The Journal of American Folklore* 117, no. 465 (2004): 300–315.

relations, in order to defuse possible oppressive outcomes deriving from the manipulation of heritage instances on behalf of the researcher. That is, in addition to the already-examined paradigm of ecopedagogy, which is here taken to encompass the notions of situatedness and practice in education, we should not blindly rely on narratives of heritage as *a priori* reliable sources of information that might help us reconstruct ‘traditional knowledge’ or a ‘non-orthodox epistemological (or educational) ecosystem.’ Rather, data collection should be mindful of the existence of a ‘discourse’ on heritage, which might act as an instrument of emancipation or oppression of the people that are directly involved with it.

Not only such approach, which is mindful of possible ‘power games,’ is helpful in defusing possible biases on behalf of the researcher, but it would also help to unveil the discourse on heritage deployed by the very community that is targeted by the ecopedagogical inquiries. In fact, biases do not just stand on the side of the investigator but permeate the entirety of social discourses and practices (as well as discourse *as a practice*).

#### 2.4.3. *From archaeology to genealogy*

The above concerns lead me to draw on Foucault’s genealogical approach as a guidance for Critical Discourse Analysis that takes into account power relations within a given discursive set.<sup>223</sup> Concerning genealogical studies, a seminal contribution in the field of education is that of Margiotta.<sup>224</sup> Margiotta remarks that genealogical studies are not opposed to history but acknowledge the fact that historical research should not aim for essentialism because the

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<sup>223</sup> See, e.g., Kerry E. Howell, *An Introduction to the Philosophy of Methodology* (Los Angeles (CA), London (UK), New Delhi (India), Singapore, Washington DC: Sage, 2013).

<sup>224</sup> Umberto Margiotta, *Genealogia della formazione: Le radici educative della condotta occidentale*, vol. 1, 2 vols (Venezia: Cafoscarina, n.d.); Umberto Margiotta, *Genealogia della formazione: I dispositivi pedagogici della modernità*, vol. 2, 2 vols (Venezia: Cafoscarina, n.d.).

identification of unquestionable truths is beyond its scope.<sup>225</sup> He acknowledges that there are some universal elements in education, which are represented by the cognitive processes shared by all human species;<sup>226</sup> however, this baseline is supplemented and enriched by community-level practices, which are reflected into discourses, models, techniques, and apparatuses that make education purposeful and value-laden.<sup>227</sup>

‘Genealogy’ is a much-discussed aspect of Foucauldian methods of inquiry and, in the way I will use it, it is helpful in making us understand the construed background behind each concept. Talking of ‘construed background’ means that what *counts* as relevant in conceptual history might not be a realist causal chain of mechanistic flavour<sup>228</sup> but rather a series of elements of the past (or of the *alleged* past) that are either taken by agents as guidance to their usage of concepts or by the historian as milestones for outlining his interpretive path. In Koselleck’s terms, time could be “historical:” that is, a construction that relates “the past and the future,” perchance with different takes on chronology.<sup>229</sup> Such assumptions could be intentional or not,<sup>230</sup> but Foucault agrees that they underpin practice that are all but ideal: that is, a genealogy works as an ideological framework that underpins actual ways of doing,<sup>231</sup> whose outcomes could be empirically appreciated, and which Foucault calls ‘positivities.’<sup>232</sup>

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<sup>225</sup> Margiotta, *Genealogia della formazione: Le radici educative della condotta occidentale*, 1:12.

<sup>226</sup> Margiotta, 1:13.

<sup>227</sup> Margiotta, 1:14.

<sup>228</sup> Reinhart Koselleck, *The Practice of Conceptual History: Timing History, Spacing Concepts*, trans. Todd Samuel Presner, *Cultural Memory in the Present* (Stanford, Calif: Stanford University Press, 2002), 123.

<sup>229</sup> Koselleck, 111.

<sup>230</sup> After all, Foucault rejected the “centrality of consciousness to meaning”. See David Hyder, ‘Foucault, Cavallès, and Husserl on the Historical Epistemology of the Sciences’, *Perspectives on Science* 11, no. 1 (March 2003): 114, <https://doi.org/10.1162/106361403322286724>.

<sup>231</sup> Michel Foucault, *L’ordre du discours* (Gallimard, 1971), 62–63.

<sup>232</sup> Michel Foucault, *L’Archéologie du savoir* (Paris (FR): Gallimard, 1969), 164–165.

Something ‘positive,’ for Foucault, bears no difference, at the skin-deep level, from what Comte meant by the same term.<sup>233</sup> ‘Positive’ is whatever could be grasped notwithstanding the mental status of its producing agents. A ‘positive’ element is, so to speak, *out there* and *up for grabs*—in other words, it has a “material connotation”.<sup>234</sup> The fact such elements exist and are treated by us as brute reality does not mean they are necessarily *raw*, because they are result of constructive processes.<sup>235</sup> In fact, in what became his philosophy of methodology, Foucault takes inspiration from some core Husserlian tenets:<sup>236</sup> the manifest image of the world is ultimately a human construct, which results from our biological, cognitive, and metacognitive makeup.<sup>237</sup> However, contrary to Husserl, Foucault is not interested in the condition of thinkability, but in the conditions of utterability at a given time and place.<sup>238</sup>

Foucault is often (and rightfully so) credited as a Heideggerian<sup>239</sup> but conceived of his study on the positive elements of discursive reality as a bridge between structuralism and Wittgenstein’s take on social constructivism.<sup>240</sup> On the one hand, as anticipated above, he agrees on the phenomenological construction of our manifest image; however, as a social

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<sup>233</sup> Shinya Shigemi, ‘Sur la “positivité” chez Michel Foucault’, in *Between Philology and Hermeneutics: Hermeneutic Research and Education on Textual Configurations*, ed. Kazuhiro Matsuzawa, 21st century COE Program International Conference series no. 11 (11th International Conference on Hermeneutic Study and Education of Textual Configuration, Nagoya: Graduate School of Letters, Nagoya University, 2011), 47–48, [https://www.gcoe.lit.nagoya-u.ac.jp/eng/result/pdf/05\\_Shigemi.pdf](https://www.gcoe.lit.nagoya-u.ac.jp/eng/result/pdf/05_Shigemi.pdf).

<sup>234</sup> Shigemi, 51.

<sup>235</sup> Shigemi, 52–54.

<sup>236</sup> Hyder, ‘Foucault, Cavallès, and Husserl on the Historical Epistemology of the Sciences’, 111.

<sup>237</sup> Darrin W. Belousek, ‘Husserl on Scientific Method and Conceptual Change: A Realist Appraisal’, *Synthese* 115, no. 1 (1998): 80, <https://doi.org/10.1023/A:1005040800466>.

<sup>238</sup> Hyder, ‘Foucault, Cavallès, and Husserl on the Historical Epistemology of the Sciences’, 112.

<sup>239</sup> Timothy Rayner, ‘On Questioning Being: Foucault’s Heideggerian Turn’, *International Journal of Philosophical Studies* 12, no. 4 (December 2004): 419–420, <https://doi.org/10.1080/0967255042000278067>.

<sup>240</sup> Mark Olssen, ‘Wittgenstein and Foucault: The Limits and Possibilities of Constructivism’, *Access: Contemporary Issues in Education* 13, no. 2 (1995): 100–102.

constructivist, he rejects the idea that the explanation of such construction could solely rely on the notion of ‘human being’ as an individual and autonomous ontological category.<sup>241</sup> Thus, Foucault believes that the acknowledgment of the construed nature of reality should *not* trigger the idea that there is some kind of hidden metaphysical reality to be unfolded, which is the secret mover behind everything.<sup>242</sup> In a crucial philosophical move, Foucault claims that, if the subconscious exists, it does not enjoy *ontological primacy*.

“Furthermore, it could be seen that such description of discourse opposes itself to the history of thought. Time and again, it is possible to reconstruct a system of thought only from a defined discursive set. But this set is addressed in a way that attempts to retrieve, beyond the statements, the intention of an uttering subject, her conscious activity, what she meant to say, or even the subconscious interplay that took place in spite of her [...]. Anyway, it is about reconstructing another discourse, retrieve the silent, whispering, untraceable word, which animates from within the voice that could be heard, and so re-establishing the small and invisible text that runs through the gaps between the written line—and perhaps distorts them. The analysis of thought is always *allegorical* in relation to the discourse it makes use of. Its question is always: what was being said in what was said? [Instead,] the analysis of the discursive field has a different orientation: it tries to grasp a statement within the narrowness and uniqueness of its occurrence; to determine the conditions of its existence, and, at best, to set its limits, to establish its correlations with other statements that could be tied to it, and to show what other forms of statements it excluded.

In this passage, Foucault claims that the retrieval of subconscious processes is not the goal of his inquiry. Trying to ‘find’ the subconscious is tantamount to the construction of an allegory, which creates something new (an interpretation) but does not reveal anything hidden or secret. In other words, the fact the subconscious is not readily accessible through human senses and requires a heuristic process of discovery to make it resurface does not mean that we reached a dimension of otherness that supervenes whatever we do, think, and are.<sup>243</sup>

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<sup>241</sup> Johanna Oksala, ‘Post-Structuralism: Michel Foucault’, in *The Routledge Companion to Phenomenology*, ed. Sebastian Luft and Søren Overgaard, First published in paperback, Routledge Philosophy Companions (London New York: Routledge, 2014), 531–532.

<sup>242</sup> Foucault, *L’Archéologie du savoir*, 40.

<sup>243</sup> Such move is possibly more inspired by a critique of Kant than of Husserl. As Whitebook puts it: “Herbert Schnadelbach has recognized that Foucault basically repeats the Hegelian

Wittgenstein is thus vindicated, since *Satz 7*<sup>244</sup> merely indicates that we reached the borders of the inexpressible, but *not* those of the non-existent. According to Weller: “the inexpressible is not simply being left out of account. On the contrary, it is being taken into account by being silenced, excluded, deported, or exiled from philosophical expression.”<sup>245</sup> The unspeakable becomes, for Foucault, a white canvas upon which we sketch the construction of social reality. What is *predicated* or *illustrated* by this sketch might not be real in a physical sense, but it stands as a layer of convictions or rules that partly (or wholly) drive human actions, move human bodies, and determine social topologies: “By making the world understandable in particular ways, discourse motivates the actions and choices of individuals.”<sup>246</sup>

Such convictions might even be a bunch of unsaturated concepts—that is, empty ideas looking for things to attach to—but nonetheless they are *there...* or at least *there for us*. Foucault does not respond to the ontological questions in either realist or non-realist terms; instead, his answer is pragmatic: we act as if ideas—or ideologies, for all that matters—were *there*, and we use them for guidance. Therefore, at the level of analysis Foucault recommends, there is no distinction to be made between truth and falsity—and the very

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demonstration of the impossibility of Kant’s transcendental project – which means he ‘assumes that the Hegelian critique of Kant’ is ‘finished and legitimate’ – without at the same time accepting the Hegelian solution to the impasse of Kantian philosophy. Instead, Foucault advocates the immanent dissolution of transcendental philosophy into a project of transgression.” Joel Whitebook, ‘Freud, Foucault and “the Dialogue with Unreason”’, *Philosophy & Social Criticism* 25, no. 6 (November 1999): 44, <https://doi.org/10.1177/019145379902500602>.

<sup>244</sup> Ludwig Wittgenstein, *Tractatus Logico-Philosophicus*, ed. Bertrand Russell, trans. David Pears and Brian McGuinness, Routledge Classics (London and New York: Routledge, 2001), pt. 7.

<sup>245</sup> Shane Weller, ‘Nothing to Be Said’, *Angelaki* 8, no. 1 (April 2003): 93, <https://doi.org/10.1080/09697250301207>.

<sup>246</sup> Timothy MacNeill, ‘Culture in Critical Development Theory’, in *Indigenous Cultures and Sustainable Development in Latin America*, by Timothy MacNeill (Cham: Springer International Publishing, 2020), 95, [https://doi.org/10.1007/978-3-030-37023-7\\_5](https://doi.org/10.1007/978-3-030-37023-7_5).

concept of “ideology” loses its significance.<sup>247</sup> The ontological dimension they pertain to is *not special* in any metaphysical sense of the term: it is not ontologically *primary*, yet it is available to agents and shapes them as subjects. The latter “are constituted discursively according to the affordances and constraints that operate in the multiple discourses that are present and in use.”<sup>248</sup>

The positive aspects of such elements could be listed as:

- (a) Their impact, which is either tangible, or could be appreciated through the senses, or could be perceived as a set of actions undertaken by agents.<sup>249</sup>
- (b) Their materiality, given everything, for Foucault, enjoys a material carrier, a vessel, or something it is attached to.<sup>250</sup>
- (c) Their rules of production,<sup>251</sup> which are usually the result of other such elements and are eventually influenced by contingencies—to the point Foucault claims that in some historical periods, at a given time and place, some statements are pragmatically impossible. For instance, the utterance of a scientific theory is always a possibility of language, but chance is it will never be uttered unless the producing conditions are met.<sup>252</sup>

To these three aspects, a fourth one could be investigated, and perchance measured:

- (d) the value attached to convictions and beliefs by agents, which are not independent from their impact but could undergo different patterns of distribution according to how they are traded; such is the notion of ideas as “goods.”<sup>253</sup>

Above, I maintained genealogy is concerned with the way our ‘construed reality’ impacts us.

So far, Foucault’s post-Kantian, post-Husserlian, post-Wittgensteinian, and post-Heideggerian break-up of reality has led us to some of the basic bricks for the construction of

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<sup>247</sup> Stuart Hall, ‘The West and the Rest: Discourse and Power’, in *Race and Racialization: Essential Readings*, ed. Tania Das Gupta et al., 2nd ed. (Toronto Vancouver: Canadian Scholars, 2018), 87.

<sup>248</sup> Jesse Bazzul and Lyn Carter, ‘(Re)Considering Foucault for Science Education Research: Considerations of Truth, Power and Governance’, *Cultural Studies of Science Education* 12, no. 2 (June 2017): 447, <https://doi.org/10.1007/s11422-016-9800-2>.

<sup>249</sup> Foucault, *L’Archéologie du savoir*, 41, 111.

<sup>250</sup> Foucault, 114.

<sup>251</sup> Foucault, 105–109.

<sup>252</sup> Compare, e.g., with Foucault, 246.

<sup>253</sup> Foucault, 158.



the positive elements of human conceptual experience: production, matter, value, and impact. However, according to Foucault, their study amounts to an *archaeology*, not yet a *genealogy*. Foucault's *archaeology* constitutes a first attempt at tackling social reality. It assumes the pragmatic ontological tenets outlined above (a–d) and it concerns itself mostly with what could be called the “discursive level.”<sup>254</sup> The key case of thusly constructed affordances he investigates is the ‘statement [*énoncé*].’ Statements display all the above properties:

- (a) They impact people and could be performative in themselves.
- (b) They exist thanks to a material component, either because expressed through actual utterances or because there are written with ink on paper;
- (c) They respond to specific rules [*lois*]<sup>255</sup> of production,<sup>256</sup> so that each community could be said to act as a bottleneck for linguistic utterances depending on who controls what;<sup>257</sup>
- (d) People attach value to statements and trade them as they trade ideas and convictions.

In heuristic terms, Foucault's path of discovery unfolded in the opposite way from how I have illustrated it. At first, he began studying ‘statements’ with a seemingly structuralist, socio-linguistic approach. Later, after his analysis identified the above four aspects of statements, he began wondering whether the ensuing quadripartite framework could be grounds for a different way to address the history of concepts—a lot less tied to linguistics and more concerned with the study of human practice. In a sense, Foucault claimed, the body of statements that constitute our non-negotiable access to history have their own layers and strata, as in archaeology. A game of constraints follows, which bears resemblance to Bateson's reading of reality in cybernetic terms: when something specific occurs (e.g., an

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<sup>254</sup> Colin Koopman, ‘Foucault's Historiographical Expansion: Adding Genealogy to Archaeology’, *Journal of the Philosophy of History* 2, no. 3 (2008): 342, <https://doi.org/10.1163/187226308X335994>.

<sup>255</sup> I hereby translate *lois* with ‘rules’ because the English word ‘law,’ might erroneously suggest that Foucault puts them at the same level as ‘natural laws.’

<sup>256</sup> Foucault, *L'ordre du discours*, 23.

<sup>257</sup> Foucault, 10–11.

instance, an occurrence, an event, an utterance), we usually look into conditions that made it possible.<sup>258</sup>

Additionally, much like archaeological artefacts, it is paramount to provide interpretations for the usage of statements (or *discourses*, that is, integrated sets of statements): ‘the process of analysis is always interpretive, always contingent, always a version or a reading from some theoretical, epistemological or ethical standpoint.’<sup>259</sup>

This could lead to either a less objectivist approach or a more objectivist one. According to the less objectivist approach, we should not “speak of findings,” but rather “use a less emphatic language” and recognize “that truth is contingent upon the subjectivity of the reader and the fickleness of language.”<sup>260</sup> In such scenario, it would be pointless to “mine a policy document for the writer’s intention” because the result is heavily dependent on the subjectivities involved, including those of the inquirers.<sup>261</sup>

Instead, I maintain a more objectivist approach is more vocal concerning the limitedness of interpretations, in a way similar to what recommended Ferraris recommends: “*it is excluded we can fetch infinite interpretations*, and it is already much if we can come up with three or four [...]. We can thus conclude that talking of ‘the infinity of interpretations’ is a mere

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<sup>258</sup> For a comparison, see Daniel White, ‘Foucault at Work: Archaeology, Genealogy, and the Dispositions of Power’, *The European Legacy* 14, no. 3 (June 2009): 317–318, <https://doi.org/10.1080/10848770902931719>.

<sup>259</sup> Margaret Wetherell, ‘Debates in Discourse Research’, in *Discourse Theory and Practice: A Reader*, ed. Margaret Wetherell, Simeon Yates, and Stephanie Taylor (London ; Thousand Oaks, [Calif.]: SAGE, 2001), 384. See also Linda J. Graham, ‘The Product of Text and “Other” Statements: Discourse Analysis and the Critical Use of Foucault’, *Educational Philosophy and Theory* 43, no. 6 (January 2011): 666, <https://doi.org/10.1111/j.1469-5812.2010.00698.x>.

<sup>260</sup> Graham, ‘The Product of Text and “Other” Statements’, 666.

<sup>261</sup> Graham, 666.

exaggeration.”<sup>262</sup> As such, the quasi-objectivist approach is better able at grasping some inherent properties of the network of relations an object is cradled in and, consequently, establish a connection with the past. Here, I do not intend to claim that access to the past could be indiscriminate, but some ties could be established with sufficient reliability—even though the establishment of such ties does not exhaust the hermeneutic richness deriving from the manipulation of past items.

For example, we might dig up an object that resembles a tool but without the explanations of first-hand witnesses, we struggle to understand whether it had ritual value (e.g., a symbol), emotional value (e.g., a *souvenir*), practical value (e.g., a tool). The quasi-objectivist Foucauldian view accepts there is more than one likely explanation: a tool of practical use could have had both emotional *and* ritual value attached to it. We might discover it had an emotional value because it was included in a network of family relationship; we might also discover it had ritual value because it was selected as a grave good as part of a practice that was used to attach new spiritual meanings to already-existing artefacts. Moreover, with a Foucauldian meta-analysis, we could recognize—and, perchance, neutralize—the influence of our own age, which drove us to ponder concerning the values of objects of the past. Such obsession with value could indeed be a hint concerning the present, rather than the past.

On a similar note, much like artefacts, statements and discourses lend themselves to interpretation. One thing is taking them at face value, whereas another thing is answering the *why* and *how* of their appearance in a given time and place.

For example, a love letter written by a soldier during World War I could be taken at face value and be understood as evidence of his feelings for his fiancée. However, in Foucauldian

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<sup>262</sup> Maurizio Ferraris, *L'ermeneutica*, 1. ed, Biblioteca essenziale 7 (Roma: Laterza, 1998), 56–57.

terms, one might begin to ask why a certain word was used instead of another one, how did the soldier articulated his experience of masculinity through the practice of writing, and why did he choose to express his feelings in one way except of another. Take a single letter, and the interpretation will be tentative because, as stated above, (a) we have limited access to the psyche of a deceased individual, and (b) a psychological explanation would not be equivalent to a historical explanation, since it would not outline the contingent rules that constrained that specific expression as part of broader societal practices.

According to the Foucauldian perspective, if a sufficiently broad body of data begins to display the same patterns, then we have cause to claim that there must be some sort of ‘love discourse’ running through the lines of enlisted soldiers in World War I—with its own (unwritten) rules, its own values, its own consequences, and its own materials, its own value.

According to Dreyfus and Rabinow, *genealogy* comes into play when Foucault starts inquiring about the causal links backing the very rules that regulate discourse.<sup>263</sup> If discourse adjusts the enunciative output of a community, what makes discourse possible in first place?

The answer is power and the present. First, Foucault acknowledges that even *his* discourse analysis of bodies of texts is the result of contingencies, rules of productions, and the like: therefore, he himself might value some layers at the expense of others—that is, he might look at history with the eyes of the present. Second, Foucault recognizes that the effort to identify social influences is shared by both the investigator and the agents that he elects as the subjects of her inquiry—that is, a co-construction of the past on behalf of both the inquirer and its subjects. Third, Foucault accepts that the dynamics governing the two above phenomena are underpinned by something at work that is not inherently linguistic: that is,

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<sup>263</sup> Hubert L. Dreyfus and Paul Rabinow, *Michel Foucault, beyond Structuralism and Hermeneutics*, 2nd ed (Chicago: University of Chicago Press, 1983), 84.

power. As Koopman observes, *The Archaeology of Knowledge* was insufficient to tackle issues where the discursive level would play a role, but not in an exquisitely declarative manner.<sup>264</sup>

Moreover, Koopman appears to identify the reason behind the choice of the word ‘genealogy:’

“If Foucault’s genealogical work is ultimately oriented towards a study of the historical conditions which have enabled and disabled certain forms of power and knowledge, then it is fair to characterize this work as a study of the emergence of new forms of power and knowledge. Archaeology, by contrast, is not a study of emergence but rather only of existence.”<sup>265</sup>

In Koopman, the key word is “emergence.” Accordingly, the study of the past (i.e., history) is functional in Foucault to the discovery of the interplay of forces that generated practices and rules that are now affecting the present. Thus, Foucauldian history qualifies as a “history of the present” rather than a present-inspired history of the past. That is, because it is able to track down the genesis (hence, genealogy) of present conditions and, in Foucault’s own words: “It is one of my targets to show people that a lot of things that are a part of their landscape—that people think are universal—are the result of some very precise historical changes.”<sup>266</sup>

With a pseudo-etymological interpretive stretch, the choice of the term ‘genealogy’ enables us to grasp the *double-entendre* of every historical and sociological research: there are natural lineages and artificial ones, but very rarely the two could be kept apart. Customarily, in human experience the artificial lineage supersedes the natural, or it is *taken as natural*.<sup>267</sup>

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<sup>264</sup> Koopman, ‘Foucault’s Historiographical Expansion’, 352–353.

<sup>265</sup> Koopman, 354.

<sup>266</sup> Foucault et al., *Technologies of the Self*, 11.

<sup>267</sup> Damien W. Riggs and Elizabeth Peel, ‘Objects of Critique’, in *Critical Kinship Studies*, by Damien W. Riggs and Elizabeth Peel (London: Palgrave Macmillan UK, 2016), 31, [https://doi.org/10.1057/978-1-137-50505-7\\_2](https://doi.org/10.1057/978-1-137-50505-7_2).

Such definition makes Foucauldian genealogy more similar to kinship studies than contemporary professional genealogy—as the latter lingers more towards ontological realism.<sup>268</sup> In line with Koopman’s reading, I argue this means that Foucauldian ‘genealogy,’ rather than taking the nature/nurture dichotomy at face value, asks questions concerning the intertwining of the two—except that Foucault does not express himself in terms of ‘nature’ and ‘nurture’ (or: ‘nature’ and ‘culture’), but with the loaded terms ‘power’ and ‘knowledge.’

#### 2.4.4. *Genealogy at work: an example*

A suzerain legitimacy might be both grounded in a series of factual events that lead a nation to establish itself as a world power, but it is also grounded on its ability to *reach out* to a mythical past and make a history of its own. For example, one could say that the ancient Rome became first a peninsular, then a Mediterranean, and eventually a European superpower because of its ability to expand, defeat ensuing foes, and overcome political and economic challenges. However, Rome becomes ‘Rome’ *also* because of its ability to weave its thread into the already-extended fabric of Hellenistic culture. Romans had their own myths, but the deal is sealed by the ability of authors such as Virgil to have their heroes seamlessly interact with the Homeric world and be accepted as such, also thanks to the strength of the resources Augustus dedicated to his propaganda machine. As maintained by Putnam: “The paradigm is Greek, not Roman, Homeric, not Stoic.”<sup>269</sup>

Interestingly, Foucault would say, the effectiveness of such process of mythological legitimation goes through the disavowal of the factual origins of Rome as a city-state: a

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<sup>268</sup> Stephen B. Hatton, ‘History, Kinship, Identity, and Technology: Toward Answering the Question “What Is (Family) Genealogy?”’, *Genealogy* 3, no. 1 (4 January 2019): 4, <https://doi.org/10.3390/genealogy3010002>.

<sup>269</sup> Michael C. J. Putnam, *Virgil’s Aeneid: Interpretation and Influence* (Chapel Hill: University of North Carolina Press, 1995), 24.

bandit kingdom<sup>270</sup> controlling a salt trade route in central Italy. Nevertheless, talking of conscious and unconscious processes could be misleading: Virgil (or other Roman writers, such as Ovid)<sup>271</sup> might not have actively hidden things about remote Roman history, possibly because they did not even have access to it and were working with what was available to them: “After all, the Greek and Roman writers of history looked back decades, or even centuries; they were often less ‘primary sources’ for history than ‘interpreters’ of history.”<sup>272</sup> That is not to say that there was no celebrative intent behind their works—quite the opposite, as Livy himself points out:

“The traditions of what happened prior to the foundation of the City or whilst it was being built, are more fitted to adorn the creations of the poet than the authentic records of the historian, and I have no intention of establishing either their truth or their falsehood. This much licence is conceded to the ancients, that by intermingling human actions with divine they may confer a more august dignity on the origins of states. Now, if any nation ought to be allowed to claim a sacred origin and point back to a divine paternity that nation is Rome.”<sup>273</sup>

However, the genealogical process ancient writers participated to was not just the result of individual efforts but spans across the very breadth of Roman history. Foucault would say that, thanks to the creative writing choices by Roman historians and poets, as well as their contemporary foreign equivalents, a series of discursive episodes set the conditions for the thinkability of Rome as a mythologically-endowed power. Additionally, the preceding existence of Homeric tales and refined Hellenistic literature had created some sort of literary

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<sup>270</sup> Greg Woolf, *Rome: An Empire's Story*, 2nd edition (New York: Oxford University Press, 2021), 4.

<sup>271</sup> Janice M. Benario, ‘Book 4 of Horace’s Odes: Augustan Propaganda’, *Transactions and Proceedings of the American Philological Association* 91 (1960): 341, <https://doi.org/10.2307/283861>.

<sup>272</sup> Ronald Mellor, *Tacitus' Annals*, Oxford Approaches to Classical Literature (Oxford ; New York: Oxford University Press, 2011), 40.

<sup>273</sup> Livy, *History of Rome*, trans. Rev. Roberts Canon (New York: E. P. Dutton and Co., 1912), no. I, pr.6–7, <http://www.perseus.tufts.edu/hopper/text?doc=Perseus%3Atext%3A1999.02.0026>.

‘trading cards’ game that Rome ended up playing owing to its increasing Mediterranean relevance—willingly or not.

A genealogical approach to the history of concepts acknowledges all of the above. Imagine conceptual history as a series of nodes in a neural network. Each node could be classified chronologically, that is, according to the time it was created. However, such classification would overlook the fact that some nodes *matter* more than others—either because they work as bottlenecks or because their threshold for transforming data is particularly low, or because their location in a complex structure makes it more *likely* for them to be interacted with than their peripheral peers.

## **2.5. Genealogy of education in Portugal**

At this stage of the inquiry, most of the epistemological categories have been illustrated and reflected upon. To conclude the chapter, I would like to add to the idea of genealogical approach by extending it to the case of Portugal. This will serve different purposes. The first one is that of introducing some general elements of Portugal’s positioning in history of education, since *Chapter 4* focuses on Terceira Island, which is more specific. Secondly, I would like to offer a further example of how the aforementioned European modernist trends had repercussions on the educational outlook of a specific country. In this latter sense, if former examples focused on Europe as a whole, now we zoom on Portugal, to remark similarities and differences. Thirdly, by analysing Portugal’s situations, some issues will emerge that make it a case worth studying, with particular focus on its peripheral regions.

### *2.5.1. From hegemony to freedom*

Possibly in line with Soysal and Strang’s problematization, which I have corroborated above with reference to Westerhuis’ research, Martins maintains that something occurred with



Portuguese formal education that is analogous to other European countries: the core of its modernist educational reforms is the “neo-humanist and idealist German ‘*humus*’.”<sup>274</sup>

The 1759 suppression of the Jesuit Order was one of the key moves in the politics of Sebastião José de Carvalho e Melo (Marquês de Pombal). This helped him achieve his “totalizing aspirations,”<sup>275</sup> but engendered several governance issues because it deprived Portugal of a religious society that had the monopoly of several services of public interests: the system of Jesuit schools was one of such public services.<sup>276</sup>

Santos shows that the reform of education under Pombal was not only driven by animosity towards the Jesuits, but also by the embracement of the ideals of the European Enlightenment, which, as long as education was concerned, was popularized in Portugal by thinkers such as Luis Antônio Verney (1713–1792) and Ribeiro Sanches (1699–1783).<sup>277</sup>

After the Civil War (1832–1834), the new liberal government launched a campaign for the promotion of social welfare.<sup>278</sup> Additionally, popular participation to policymaking was notable:

“Many Portuguese citizens, animated by an idealism born of the successes of the liberal revolution, considered it an elementary civic duty to contribute with their opinions to the construction of institutions. In this order of ideas, proposals for public education reforms appeared, exposing them in articles published in the press of the time or presenting them in reports, with the aspect of formal [legislative or policy] projects.”<sup>279</sup>

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<sup>274</sup> Ernesto Candeias Martins, ‘Os caminhos da historiografia educativa portuguesa: da história á educação’, *História da Educação* 8, no. 16 (2004): 29.

<sup>275</sup> Halysson F. Dias Santos, ‘Educação, cultura e poder na era pombalina’, *Colóquio do Museu Pedagógico*, 2007, 537.

<sup>276</sup> Santos, 544.

<sup>277</sup> Santos, 538–539.

<sup>278</sup> Justino Pereira de Magalhães, ‘Para Uma História Da Educação de Infância Me Portugal’, *Saber Educar* 2 (1997): 22.

<sup>279</sup> Martins, ‘Os caminhos da historiografia educativa portuguesa: da história á educação’, 30–31.

However, such enthusiasm was met with a series of vicissitudes, which, according to Martins, place Portugal in the category of countries that engaged in a rhetorical construction of education.<sup>280</sup> In other words, all talk and no trousers.

It was only during the First Republic (1910–1926) that these ideas were finally met with effective implementation.<sup>281</sup> The turning point was determined—says Martins—by the development of education science, which offered useful tools to compare Portugal’s situation and that of other countries all around the globe.<sup>282</sup>

This history of early childhood education in Portugal is in stark contrast with that of primary schooling, which received its first impulse through the creation of “*escolas normais*” (secondary teacher education) for males (1862) and females (1866), as well as the reforms introduced by Rodrigues Sampaio (1878–1881), which created a system of diplomas and promoted the training of female teachers.<sup>283</sup> Formal accreditation of primary school teachers dates 1901, and by the end of 1934 the *Estado Novo* had devised the creation of “*magistério* [degree in teaching].”<sup>284</sup>

Notwithstanding such partial improvements, a slowing factor was represented by illiteracy. Martins identifies three periods in which campaigns were launched to increase the rate of literacy: 1878–1930, 1930–1960, and 1960–1974.<sup>285</sup> The most hit areas were the rural ones, which experienced, at the same time: lack of teacher professionalism, higher rates of child illiteracy, poor educational outcomes, and high dropout.<sup>286</sup>

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<sup>280</sup> Martins, 31.

<sup>281</sup> Martins, 31–32.

<sup>282</sup> Martins, 32.

<sup>283</sup> Martins, 32.

<sup>284</sup> Martins, 32.

<sup>285</sup> Martins, 39.

<sup>286</sup> Martins, 40.

According to Magalhães, early Twentieth-Century Education (and that of the First Republic in particular) was characterised by a proliferation of childhood institutions, which was not matched by appropriate teacher education—which was often left to individual women or religious orders, such as the Doroteas.<sup>287</sup> Development was slow: in late Nineteenth Century, only two kindergartens existed: “one in Lisbon and the other one in Porto.”<sup>288</sup> Momentum was gained thanks to the constitution of the Associação de Escolas Móveis pelo Método João de Deus, Bibliotecas Ambulantes e Jardins-Escolas (1908), which conflated the “João de Deus Method” with Froebel-inspired kindergarten management; its first kindergarten was opened in Coimbra in 1911.<sup>289</sup> The number of kindergartens rose to seven in Porto, by 1923, and twelve in Lisboa, by 1926: these kindergartens acted as preparatory schools, usually as an annex to the primary schools established in 1919.<sup>290</sup>

In contemporary times, the event that impacted most profoundly Portuguese education was the rise and fall of the Estado Novo [*New State*]. “Estado Novo” is the expression used to define Portuguese totalitarian experience, which began with the military coup d’état in 1926,<sup>291</sup> consolidated in 1933 with the official establishment of the Estado Novo following the 1932 appointment António de Oliveira Salazar as Prime Minister,<sup>292</sup> and ended with the Carnation Revolution of 1974.<sup>293</sup> In that period, an authoritarian and corporatist regime was

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<sup>287</sup> Magalhães, ‘Para Uma História Da Educação de Infância Me Portugal’, 24.

<sup>288</sup> Magalhães, 24.

<sup>289</sup> Magalhães, 24.

<sup>290</sup> Magalhães, 24.

<sup>291</sup> Douglas L Wheeler, *Republican Portugal: A Political History, 1910–1926* (University of Winsconsin Press, 1998).

<sup>292</sup> Luis Nuno Rodrigues, ‘The Creation of the Portuguese Legion in 1936’, *Luso-Bazilian Review* 34, no. 2 (1997): 91–107.

<sup>293</sup> José Javier Olivas Osuna, ‘The Deep Roots of the Carnation Revolution: 150 Years of Military Interventionism in Portugal’, *Portuguese Journal of Social Science* 13, no. 2 (1 June 2014): 215–31, [https://doi.org/10.1386/pjss.13.2.215\\_1](https://doi.org/10.1386/pjss.13.2.215_1).

installed,<sup>294</sup> which suppressed trade unions and constrained freedom of expression<sup>295</sup>—following a pro-fascist trend that had already originated in the 1910s.<sup>296</sup> As expected from an authoritarian regime, school and education received abundant attention by policymaker. Pereira’s article is a key historiographical work concerning this topic, and I will summarise here some of its main points.<sup>297</sup>

According to Pereira, one of the main goals of the Estado Novo was to foster popular support. Consequently, it deployed an ideological discourse and made inclusion in society conditional to the participation to such discourse.<sup>298</sup> Institutions had a shared goal: the creation of an authoritarian “new man,” shaped by discipline and devoted to “national needs.”<sup>299</sup> Teachers were forbidden to unionise, and their social role was diminished, in favour of that of inspectors, which drove policymaking and its implementation.<sup>300</sup> Contradictorily, the national gazette on teacher professionalism kept emphasising the role of teachers—and especially rural teachers—as life coaches: their role was to ensure the masses would not be unruly, but respectful of discipline and equipped with practical and easily expendable skills.<sup>301</sup>

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<sup>294</sup> Manuel De Lucena, ‘2. The Evolution of Portuguese Corporatism under Salazar and Caetano’, in *Contemporary Portugal*, ed. Lawrence S. Graham and Harry M. Makler (University of Texas Press, 1979), 47–88, <https://doi.org/10.7560/710474-005>.

<sup>295</sup> Ana Cabrera, ‘La Memoria y El Olvido: La Censura Del Estado Novo En Portugal a Través de Tres Piezas de Autores Españoles’, *Revista De Teoria De La Literatura Y Literatura Comparada* 10 (2014): 89–110.

<sup>296</sup> Giulia Albanese, ‘In the Mirror of Fascism’, in *Conservatives and Right Radicals in Interwar Europe*, ed. Marco Bresciani, Routledge Studies in Fascism and the Far Right (Abingdon, Oxon ; New York: Routledge, 2021); Luís Reis Torgal, *Estados Novos, Estado Novo: Ensaio de História Política e Cultural Vol. I* (Imprensa da Universidade de Coimbra, 2009), 53–65.

<sup>297</sup> Maria Paula Pereira, ‘A escola portuguesa ao serviço do estado novo: as lições de história de portugal do boletim do ensino primário oficial e o projeto ideológico do salazarismo’, *Da Investigação às práticas* 4, no. 1 (2013): 63–85.

<sup>298</sup> Pereira, 65.

<sup>299</sup> Pereira, 67.

<sup>300</sup> Pereira, 67.

<sup>301</sup> Pereira, 69.

According to Pereira, the teaching of history was fundamental for the legitimization of the Estado Novo. The latter was pictured as a “necessity” and its head, dictator Salazar, was to be represented as someone who was close to the needs of the people; Nation and Homeland overlap, and the key concepts conveyed through schooling were: “God, Homeland, Family, and Work.”<sup>302</sup> The family was to be understood in the conservative Catholic sense of the term.<sup>303</sup> A cult of heroes is disseminated, with major references to the distant past, whose narrative would not question the establishment of the regime.<sup>304</sup>

Overall, as Martins put it, the greatest educational challenge faced by the Estado Novo was not control, but literacy: “Estado Novo stressed on the ideological functions of education and, in 1950, it promoted the Plans to Nurture Literacy as an attempt, among the others, to pull the country out of the crisis of that age.”<sup>305</sup> Nonetheless, he adds, such plans were still drafted with the goal of disciplining the people and without a genuine interest to raise the living conditions of the Portuguese citizenry:<sup>306</sup>

“As expected, the Portuguese educational movement experienced deep changes. Some relevant educational measures emerged, like, for example, the creation of public primary school and of a supplementary primary curriculum (suppressed in 1932), the reduction of curricula, the ban of co-ed classes, the creation of a national commission for the production of textbooks (drawing on the Italian example), the disqualification of the role of primary teachers, the recruitment of unprepared school managers, [...] the suppression of Teacher Training Schools [*escolas normais superiores*], the extinction of ‘mobile schools,’ etc. [...] At the level of primary schooling, compulsory schooling was reduced [...]. In secondary schooling [*ensino liceal*], which had [already] elitist features, policies made access more difficult, thus managing to preserve some quality of teaching, but which aimed to strengthen the family (social cellule), ‘faith’ (an element of unity and national solidarity), the ‘principle of authority’ that was fundamental for progress, ‘respect for hierarchy’ (a basic condition

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<sup>302</sup> Pereira, 70–71.

<sup>303</sup> Pereira, 75.

<sup>304</sup> Pereira, 77.

<sup>305</sup> Ernesto Candeias Martins, ‘Desenvolvimento, Educação e Assistência Social No Salazarismo’, *Revista Espaço Pedagógico* 13, no. 3 (6 August 2018): 124, <https://doi.org/10.5335/rep.v13i3.7819>.

<sup>306</sup> Martins, 125.

to cooperate to achieve common values), and scientific and literary education [...]. Portugal experienced a system of professional education that was grounded on lengthy apprenticeships, accompanied by symbolic rituals of professional initiation and promotion. The power of older workers was based on ‘knowledge’ that was selectively transmitted, according to a familiar model of oral culture.”<sup>307</sup>

The advent of the *Estado Novo*, with its conservative and patriarchal politics, eventually determined the shutdown of pre-schools and kindergartens (1936).<sup>308</sup> However, after World War II, such policies were reverted, and the João de Deus movement, which had always been active under the guise of private education, came back to prominence.<sup>309</sup>

Consequently, historiography suggests the *Estado Novo* was not the solution to educational poverty but an aggravating factor. For example, even if the 1950s saw the creation of several kindergartens and pre-schools, as well as institutes for the training of early childhood educators,<sup>310</sup> the geographical location of these teacher training facilities made it hard to improve the skills of rural childhood educators.<sup>311</sup> As of the Carnation Revolution (1974), childhood educators enjoyed no status in terms of professional qualifications and certifications.<sup>312</sup>

### 2.5.2. *Contemporary challenges in Portuguese education*

After the fall of the *Estado Novo*, Portugal was in dire straits. According to Marie, literacy rates were very low—especially among women;<sup>313</sup> Teodoro and Aníbal concur with her and

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<sup>307</sup> Martins, 131–132.

<sup>308</sup> Magalhães, ‘Para Uma História Da Educação de Infância Me Portugal’, 25.

<sup>309</sup> Magalhães, 25.

<sup>310</sup> Magalhães, 25.

<sup>311</sup> Magalhães, 25.

<sup>312</sup> Magalhães, 25.

<sup>313</sup> Pierre Marie, ‘Revolução Dos Cravos e Educação Popular. As Associações de Educação Popular Em Portugal (1974-1986)’, *Revista de História Da Sociedade e Da Cultura* 17 (2017): 372.

report a global Portuguese illiteracy rate of 34%.<sup>314</sup> Most of the effort to increase literacy was undertaken by associations of volunteers, which had already established themselves in the 1960s following the Brazilian example of Freire: Marie acknowledges the success of such bottom-up approach.<sup>315</sup> The State acknowledged the importance of associationism and supported it with funding and tailor-made policies.<sup>316</sup> Eventually, it launched its own plan for adult literacy, which lasted at least until 1980–1983, when it began being gradually defunded.<sup>317</sup>

According to Marie, contemporary education in Portugal is characterized by a decline in associationism, which was the driver behind post-1974 alphabetization.<sup>318</sup> In 1997, Magalhães, addressing the contemporary education system in Portugal, remarked that, the younger the cohort, the more it focused on moral education: notwithstanding the obvious concern for the personal hygiene and autonomy of the children, pre-school was still subject to a moral discourse—whose control was in the hands of politicians.<sup>319</sup> That is a close call for Foucauldian genealogists, inasmuch they tell of a world in which power relations are more nuanced and less apparent. In the case of Estado Novo, the target was clear; instead, in emancipated Portugal critique can be harder because of the multiplication of roles and interests behind educational processes. For example, according to Magalhães, the main categories in the debate concerning childhood education are still influenced by Eighteenth-

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<sup>314</sup> António Teodoro and Graça Aníbal, ‘A Educação em tempos de Globalização: Modernização e hibridismo nas políticas educativas em Portugal’, *Revista Lusófona de Educação* 10 (2007): 14.

<sup>315</sup> Marie, ‘Revolução Dos Cravos e Educação Popular. As Associações de Educação Popular Em Portugal (1974-1986)’, 375.

<sup>316</sup> Marie, 377.

<sup>317</sup> Marie, 383.

<sup>318</sup> Marie, 384–386.

<sup>319</sup> Magalhães, ‘Para Uma História Da Educação de Infância Me Portugal’, 22.

Century Enlightenment.<sup>320</sup> Enlightenment education used to support pedagogies based on rewards and punishments, as per the culturalist assumption of the *tabula rasa* (or the assumption that natural determinism could be reverted through disciplinary correction) and the idea that ‘nature’—broadly construed—could be harmful to children.<sup>321</sup> Until the end of the 1990s, most childhood education services would be provided depending on available State or local contracts, which would award funds to fixed-term projects concerning childhood.<sup>322</sup>

Teodoro and Aníbal acknowledge the existence of four driving ideologies that characterized Portuguese education between “1974 and 1999:

- (i) A *democratizing* and *critical* ideology
  - (ii) A *democratic* ideology
  - (iii) An ideology of *modernization* and
  - (iv) An ideology of *inclusion*,
- all of which, in turn, are inspired by ‘four legitimate ways to define education:’
- (i) a *political* definition,
  - (ii) a *juridical* definition,
  - (iii) an *economic* definition,
  - (iv) an *organizational* definition”<sup>323</sup>

Teodoro and Aníbal remark that, at first, post-Revolutionary Portugal followed the democratization path: educational environments were characterized by associationism, creativity; later, the qualification of workforce became the most prominent (economic) driver.<sup>324</sup> This shift, according to these scholars, was accompanied by the three stages of Portuguese economical integration with the European sub-continent: “from 1975 to 1985,” Portugal began to open its markets and converge with the European Economic Community; “from 1985 to 1997,” living conditions rose; finally, “from 1998” Portugal achieved

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<sup>320</sup> Magalhães, 23.

<sup>321</sup> Magalhães, 23.

<sup>322</sup> Magalhães, 25–26.

<sup>323</sup> Teodoro and Aníbal, ‘A Educação em tempos de Globalização: Modernização e hibridismo nas políticas educativas em Portugal’, 17.

<sup>324</sup> Teodoro and Aníbal, 17–18.



“monetary and financial identification with the Euro currency and the stability compact.”<sup>325</sup>

Drawing on that historical outlook, Teodoro and Aníbal conclude that Portuguese education is necessarily hybrid: on the one hand, economic pressure and convergence with other European partners boosts standardization and conformism under the label of libertarian individualism; on the other hand, the adoption of a democratizing discourse pushes for constructivist approaches in education that counter economic egotism.<sup>326</sup> To put it in Habermas’ words: as current democracies become more reflexive and disrobe themselves of the acritical religious acceptance of received practices and traditions,<sup>327</sup> even education is redrawn as a debatable aspect of public life.

Writing again in 2004, Martins observes that education sciences are putting renewed emphasis on the study of history of education, but research is still missing concerning local and regional settings.<sup>328</sup> In his view, the Portuguese educational system is emerging from a situation that was characterized, in the past century, by rampant illiteracy rates, little access to tertiary education, and sub-standard conditions for teachers and education professionals.<sup>329</sup>

Nowadays, Portugal is a post-industrial society with an advanced economy and a well-developed ICT infrastructure.<sup>330</sup> On the downside, Portugal is facing recession due to the 2020–2021 Sars-CoV-2 pandemic; youths and temporary workers suffered greater losses in terms of jobs<sup>331</sup> and it has a very high public debt.<sup>332</sup> According to OECD, the number of graduates is growing steeply—half of the 25–34 year-olds had a tertiary qualification in

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<sup>325</sup> Teodoro and Aníbal, 18.

<sup>326</sup> Teodoro and Aníbal, 21–23.

<sup>327</sup> Habermas, *Time of Transitions*, 55.

<sup>328</sup> Martins, ‘Os caminhos da historiografia educativa portuguesa: da história á educação’, 26.

<sup>329</sup> Martins, 32–35.

<sup>330</sup> OECD, ‘Portugal: Overview’, Extract, OECD Economic Surveys, December 2021, 11, <http://www.oecd.org/economy/portugaleconomicnapshot/>.

<sup>331</sup> OECD, 9–10.

<sup>332</sup> OECD, 37.

2021—, the ratio of 3–5 year-olds in “early childhood education programmes” is 93%, and there are more female secondary graduates than men.<sup>333</sup>

Additionally, Mogarro observes that Portugal is experiencing an increased interest for the so-called “educational heritage,” which saw the emergence of what she calls a new field of interest for educators.<sup>334</sup> The role of heritage in education appears not only to become relevant in face of relevant ministerial policies,<sup>335</sup> but also because, as I claimed above, heritage is key to sustainable education practices. Indeed, Mogarro’s contribution is seminal inasmuch it recognizes that there is not only a role for heritage *in* education, but that education enjoys its own heritage and, as such, it deserves its own space of inquiry.<sup>336</sup>

With such investigative concerns in mind, and owing to a fortuitous<sup>337</sup> encounter with Francisco Sousa, Associate Professor at the University of Azores, I set out to make Portugal my fieldwork of choice.

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<sup>333</sup> OECD, ‘Portugal: Overview of the Education System (EAG 2022)’, Country analysis, Education GPS (OECD, 30 October 2022), <http://gpseducation.oecd.org/>.

<sup>334</sup> Maria João Mogarro, ‘Patrimonio de la Escuela y modelos de Cultura Escolar en la Historia de la Educación Portuguesa’ 22 (2012): 68–71.

<sup>335</sup> Mogarro, 72.

<sup>336</sup> Mogarro, 88–89.

<sup>337</sup> Not so fortuitous, apparently, since his visit 2020 to Università Niccolò Cusano (Rome) was being funded by the Erasmus+ Mobility Programme.

### 3. Methodology: Ecopedagogy and ethnography of cultural heritage

This methodological chapter is divided into three parts. *Section 3.1.* deals with the analytical categories that have emerged in *Chapter 2* and examines them to ensure their operationalization. *Section 3.2.* presents a pilot investigation, in which such categories are applied. *Section 3.3.* outlines the materials and methods of the main study, which will unfold in *Chapters 4, 5, and 6.*

#### 3.1. Analytical categories

Drawing on *Chapter 2*'s theoretical inquiry, I hereby proceed to list and explain the main analytical categories that I will employ in the rest of the study.

##### 3.1.1. Communities of practice

As anticipated by my treatment of Lave and Wenger,<sup>1</sup> my focus will be on communities of practice rather than individuals. According to Hoadley, there are different definitions of this concept.<sup>2</sup>

The first definition is “feature-based” and it is grounded on “Orr’s [and] Lave and Wenger’s [...] key insight; namely, that knowledge, and therefore learning, [are] embedded in cultural practices.”<sup>3</sup> However, according to Hoadley, the feature-based view of communities is still reliant on the work of Constant, whose impact he summarizes as follows:

“The feature-based definition of a community of practice entails [...] the anthropological view of knowledge and situated learning [is not accounted for by] knowledge structures in the head (as with cognitive constructivism), nor behaviors

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<sup>1</sup> Lave and Wenger, *Situated Learning*.

<sup>2</sup> Christopher Hoadley, ‘What Is a Community of Practice and How Can We Support It?’, in *Theoretical Foundations of Learning Environments*, ed. David H. Jonassen and Susan M. Land, 2nd ed (New York: Routledge, 2012), 286.

<sup>3</sup> Hoadley, 287.

conditioned by an environment (as with behaviorism), but rather as a property lying somewhere between individuals and cultures, involving practices in context.”<sup>4</sup>

The second definition is that of “communities of practice as a process,” which reflects more closely Lave and Wenger’s concern for gradual inclusion through “legitimate peripheral participation.”<sup>5</sup> According to Hoadley, this idea entails: that there is “access to experts,” that communities “already exist,” and that there are appropriate “space[s]” for peripheral participation to occur.<sup>6</sup>

The third definition focuses on the way communities of practice could be designed.<sup>7</sup> The focus is on *creating* them, rather than *detecting* them. In this sense, it appears to me that this definition is less relevant to ethnographic, *post hoc* inquiry and more relevant to action-research projects. According to this definition, a knowledge-building community is just a specific case of community, whose standard outcome is that of distributing knowledge among its participants.<sup>8</sup> Though appealing, this definition focuses more on the ability to create new communities in educational settings than on the possibility to identify non-orthodox practices of ecopedagogical relevance. Therefore, I will leave this definition by the side over the course of this specific investigation.

However, one of the points raised by Hoadley in relation to this last definition is particularly fruitful: given supporters of the *creation* of communities of practice drew eminently on technologies—and ICT in particular—to nurture their communities, it follows that, even in a seemingly ‘natural’ environment, the existence of a community of practice should be highlighted by the introduction, at some stage, of a new technology, technique, system, or

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<sup>4</sup> Hoadley, 289.

<sup>5</sup> Hoadley, 289–290.

<sup>6</sup> Hoadley, 290.

<sup>7</sup> Hoadley, 291.

<sup>8</sup> Hoadley, 292.

apparatus, which favours contact between people who share the same interests.<sup>9</sup> As we will see, this is the case for Carnival in Terceira Island.

### 3.1.2. *Situatedness and negotiability*

In *Chapter 2*, I related the notions of ‘situatedness’ and ‘negotiability.’ The latter serves as an operationalization of the former, which enables the investigator to place practices in a continuum. This continuum reflects the number of resources that are needed to overcome certain challenges or attain a certain goal. Here, I will not retrace the theoretical steps that brought me to arrange for such pairing of notions; however, I will endeavour to consolidate their relationship to illustrate its heuristic efficacy.

According to Rebughini,<sup>10</sup> who draws on Goffman, “a situation [is] the place *where action is*.”<sup>11</sup> By claiming this, we place ourselves out of the psychologistic frame and shift the attention towards the environment. As Rebughini puts it, this move is in line with Dewey’s idea of education as experience.<sup>12</sup>

A good way to illustrate the continuum of negotiability is with reference to supra-individual (cultural, heritage-related) coping mechanisms. The issue of coping could of course be addressed in quantitative terms;<sup>13</sup> however, it is at the qualitative level that community bonding and cultural production ensue. For example, Richardson and Maninger observed that, after a disaster, survivors engage in the following coping activities:

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<sup>9</sup> Hoadley, 294–297.

<sup>10</sup> Paola Rebughini, ‘Agency in Intersectionality. Towards a Method for Studying the Situatedness of Action’, *Socio*, no. 15 (15 April 2021): para. 3, <https://doi.org/10.4000/socio.11329>.

<sup>11</sup> Compare with Erving Goffman, *Frame Analysis* (New York: Harper, 1969).

<sup>12</sup> Rebughini, ‘Agency in Intersectionality. Towards a Method for Studying the Situatedness of Action’, para. 4.

<sup>13</sup> For example, see the study of Ting Wang et al., ‘Quantitative Assessment of Natural Disaster Coping Capacity: An Application for Typhoons’, *Sustainability* 12, no. 15 (23 July 2020): 5949, <https://doi.org/10.3390/su12155949>.

“Mutuality, a reciprocal pattern of emoting and shared problem recognition; co-construction of a community narrative, or participants relaying the story of the town’s unity and bootstrap mentality; and problem-centered communal coping, which centered on material assistance and information sharing.”<sup>14</sup>

Drawing on disasters is an extreme but serves the conceptual purpose: heritage production *could* follow ‘bigger-than-me’ events. If this example sounds bleak, one could always find shelter in the Heideggerian view of ‘thrownness’ and realize that the biggest disaster one could experience is life itself.<sup>15</sup> Ontological jokes aside, it is ascertained that cultural production and heritage usage is not guaranteed in times of extreme stress; in this sense, Richardson and Maninger’s example might sound stereotypical because it is the type of narrative we would like to hear, but it is not mirrored in other researches on disaster coping mechanisms. For example, Hilhorst et al. discovered that, in times of great stress for communities, the coping mechanisms of indigenous people are usually tacit and not subject to specific formulations—which casts doubts on mainstream narratives of alleged ‘native resilience.’<sup>16</sup>

However, as far as the current investigation is concerned, the case of narratives emerging from disasters contributes to the demarcation of the negotiability continuum: to deploy supra-individual resources, a situation should be stressful enough to push individuals towards the collective, but not as stressful as to tear down the collective itself.

### 3.1.3. Practice and apparatus complexity

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<sup>14</sup> Brian K. Richardson and Laura Maninger, “‘We Were All in the Same Boat’: An Exploratory Study of Communal Coping in Disaster Recovery”, *Southern Communication Journal* 81, no. 2 (14 March 2016): 107, <https://doi.org/10.1080/1041794X.2015.1111407>.

<sup>15</sup> For an illustration of existentialism, see, e.g., Dr. Jack Reynolds, *Understanding Existentialism*, 0 ed. (Routledge, 2014), <https://doi.org/10.4324/9781315712147>.

<sup>16</sup> Dorothea Hilhorst et al., ‘Is Disaster “Normal” for Indigenous People? Indigenous Knowledge and Coping Practices’, ed. Dr Roanne van Voorst, Dr Ben Wisner, D, *Disaster Prevention and Management: An International Journal* 24, no. 4 (3 August 2015): 506–22, <https://doi.org/10.1108/DPM-02-2015-0027>.

In *Chapter 2* I have dealt extensively with the conceptual issues concerning the notion of *apparatus*, especially in regards to Foucauldian philosophy and its rendering by Bussolini.<sup>17</sup>

Here, I will try to outline some criteria on how to spot an apparatus.

According to Santamarina and Beltran, apparatuses are strongly tied to monitoring, discipline, and practices of control.<sup>18</sup> When apparatuses are deployed, they argue, hegemony ensues: most often, apparatuses are involved in domination strategies. As Smith argues, this is clear in the case of vigilance,<sup>19</sup> but Santamarina and Beltran maintain that this is also the case of ‘heritage,’ especially when the control on the narrative of heritage is centralized.<sup>20</sup> The issue, they claim, is that if heritage depends on State apparatus (or an analogous authority), it loses one of its key component, which fluid and cannot be certified: subjective appreciation.<sup>21</sup>

For example, Corrêa acknowledges the insensitive application of international (European) laws to cultural practices might lead to disastrous situations and loss of heritage.<sup>22</sup> The Miacelense *Bolo Lêvedo* is an example of how traditional practices have changed over the course of time. Corrêa reports little is known about the long history of this type of bread, which is cooked by lowering a wrapped pan in a hole where the underground temperature of

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<sup>17</sup> Bussolini, ‘What Is a Dispositive?’

<sup>18</sup> Beatriz Santamarina and Oriol Beltran, ‘Heritage and Knowledge: Apparatus, Logic and Strategies in the Formation of Heritage’, *Anthropological Forum* 26, no. 4 (1 October 2016): 397–414, <https://doi.org/10.1080/00664677.2016.1224763>.

<sup>19</sup> Laurajane Smith, *Archaeological Theory and the Politics of Cultural Heritage*, 0 ed. (Routledge, 2004), <https://doi.org/10.4324/9780203307991>.

<sup>20</sup> Santamarina and Beltran, ‘Heritage and Knowledge’.

<sup>21</sup> Santamarina and Beltran.

<sup>22</sup> Luiz Nilton Corrêa, ‘Certificação de produtos tradicionais, educação e inovação de um patrimônio regional: o caso do “Bolo Lêvedo dos Açores”’, in *Inovação cultural, patrimônio e educação*, ed. Angel B. Espina Barrio, Antônio Motta, and Mário Hélio Gomes (Recife, PE: Fundação Joaquim Nabuco, Editora Massangana, 2010), 148.

the volcanic island would bake it.<sup>23</sup> The mastery of this culinary art could be traced back to a single family, which later taught it to others: to date, up to five bakeries [*padarias*] bake *Bolo Lêvedo*, but their customers have changed from locals to foreign tourists.<sup>24</sup> Without the support of the regional Trades Association [*Centro Regional de Apoio ao Artesanato*], it would not have been possible to keep up the baking practice in face of increased food safety restrictions.<sup>25</sup> Eventually, the build-up of requests to preserve traditional arts and crafts—including culinary practices—resulted in the creation of the “*Artesanato dos Açores*” brand, which served also as a certification process.<sup>26</sup> However, it is still debated whether “certification” is the right concept, since it assumes power on behalf of the certifying authority and, conversely, disempower producers; rather, it could be seen as a “qualification” process.<sup>27</sup>

These take on State apparatuses and heritage do not suggest the possibility of a ‘neutral’ usage of the term ‘apparatus.’ Actually, in Foucauldian terms, neutrality is impossible, and apparatuses always reflect some type of vigilance, control, and functioning—at the expense of individual agency. That is certainly the case for most of Foucault’s genealogies of contemporary apparatuses.<sup>28</sup>

However, Verkerk et al. contend:

“Foucault does not want to describe the effects of power exclusively in negative terms like exclude, repress or conceal. ‘In fact’, he writes, ‘power produces; it produces reality; it produces domains of objects and rituals of truth. The individual and the knowledge that may be gained of him belong to this production’ [...]. Foucault

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<sup>23</sup> Corrêa, 150–151.

<sup>24</sup> Corrêa, 155–156.

<sup>25</sup> Corrêa, 157–158.

<sup>26</sup> Corrêa, 160.

<sup>27</sup> Corrêa, 163.

<sup>28</sup> See, e.g., Michel Foucault, ‘Alternatives to the Prison: Dissemination or Decline of Social Control?’, *Theory, Culture & Society* 26, no. 6 (2009): 12–24, <https://doi.org/10.1177/0263276409353775>.



convincingly proves that power is organised in spoken and written language ('discours') and in the way in which activities are organised in actual situations ('discursive practices'). He explains that every element of technology and organisation has an aspect of power. And this aspect of power can be both positive and negative."<sup>29</sup>

If power can be either negative or positive (in ethical terms), then, the authors argue, even participatory democracy has its own apparatuses—except that, maybe, they deploy power in a more distributed way.<sup>30</sup> This issue is at the core of the so-called Lippmann-Dewey debate, which Minello has analysed with my collaboration under the light of the 'Greater Humanities' manifesto.<sup>31</sup> The study concludes that apparatuses are needed to ferry communities across the turbulent seas of superstition and pseudo-science, in order to achieve a sufficiently informed status that could enable them to authentically participate in democratic processes.<sup>32</sup> However, once these apparatuses have served their purpose, they should disengaged and repurposed.<sup>33</sup> Therefore, apparatuses could be good, if not necessary.

#### 3.1.4. *Ecopedagogical criteria*

Notwithstanding the above, there is one statement by Minello and I, which I would like to clarify after the theoretical considerations of *Chapter 2*: "everything could be sacrificed to the functioning of the man-*dispositif*."<sup>34</sup> This assertion echoes those of Recalcati,<sup>35</sup> when taken out of context, it might sound like a way to indiscriminately support anthropocentrism at the

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<sup>29</sup> Maarten Johannes Verkerk et al., *Philosophy of Technology: An Introduction for Technology and Business Students*, trans. M Nelson, English edition (London: Routledge, Taylor & Francis Group, 2016), 228.

<sup>30</sup> Verkerk et al., 228.

<sup>31</sup> Rita Minello and Andrea Mattia Marcelli, 'Technoscience and Citizenship: A Dewey-Inspired Reading of the Educational Challenges of Contemporary Participatory Democracy', *Q-Times Webmagazine* 13, no. 1 (January 2021): 29–40.

<sup>32</sup> Minello and Marcelli, 33–36.

<sup>33</sup> Minello and Marcelli, 35.

<sup>34</sup> Minello and Marcelli, 37.

<sup>35</sup> Massimo Recalcati, 'L'eclissi Del Desiderio', in *Forme Contemporanee Del Totalitarismo*, ed. Massimo Recalcati (Torino: Bollati Boringhieri, 2007).

expense of other realities. However, this is hardly the case, since both Minello and I agree that the “living being” should be understood in a processual scope: that is, even the “human being” [*anthropos*] is a project, rather than a fixed essence.

Such consideration bounces us back to another set of analytic categories I would like to employ, which are all drawn on Misiaszek’s understanding of ecopedagogy.<sup>36</sup> Misiaszek focuses on “Global Citizenship Education,”<sup>37</sup> but what he proposes is a general framework for ecopedagogical investigation and action. I will repeat here the list included in *Chapter 2*:

- The need to “learn socio-environmental perspectives and traditions that are different from our own”<sup>38</sup>
- The importance of respecting “local knowledge and values in order to determine the socio-environmental issues that individuals should focus on and the resources to be used in the process.”<sup>39</sup>
- The adoption of “bottom-up pedagogical constructions”<sup>40</sup>
- “Democratisation of the learning processes,” which entails facilitating learners’ expression of “their own understanding and actions”<sup>41</sup>
- Attention to globalization processes, understood in a bi-directional way.<sup>42</sup>
- Open-minded attitude towards the investigated processes—that is, by rejecting *a priori* biases (such as: ‘technology is inherently bad’).<sup>43</sup>

The above list serves two methodological aims. The first one is that of providing a sift to identify which practices fit the tenets of ecopedagogy. As such, it could be applied to empirical observations, to see what checks. The second aim, is an that of providing some *regulae ad directionem ingenii* [rules for the direction of the mind]<sup>44</sup> or thumb-rules for scientific inquiry.

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<sup>36</sup> Misiaszek, ‘Ecopedagogy and Citizenship in the Age of Globalisation’.

<sup>37</sup> Misiaszek, 284.

<sup>38</sup> Misiaszek, 282.

<sup>39</sup> Misiaszek, 282.

<sup>40</sup> Misiaszek, 282.

<sup>41</sup> Misiaszek, 283.

<sup>42</sup> Misiaszek, 284.

<sup>43</sup> Misiaszek, 284.

<sup>44</sup> For the source of the expression, see Renée Descartes, *Regulae ad directionem ingenii*, Brill Bilingual Edition (Brill, 1998).

The latter aim is sympathetic with what Stefanelli, in his typology, calls the acquisition of “crucial anthropological skills:” that is, “critical estrangement, contextualisation and engaged listening.”<sup>45</sup>

“Critical estrangement” is defined as

“Deconstructing and relativizing the lived world. In other words, this is about questioning categories, discourses and knowledge that are encountered, accepted and deployed in the everyday and which validity is otherwise taken for granted.”<sup>46</sup>

“Engaged listening” has the following meaning:

“The necessity for anthropologists to embrace and maintain a serious commitment to actually listen to all their interlocutors with an open and receptive mindset, rather than letting assumptions and preconceived expectations guide them instead in their interactions and analyses.”<sup>47</sup>

Drawing on Wineburg’s classic experiment on historical problem solving, “contextualisation” could be understood as the ability to situate a source “in a concrete temporal and spatial context.”<sup>48</sup> *Mutatis mutandis*, for the anthropologist it means making sense of a phenomenon considering the context in which it occurs and not some idealized frame of reference.

Ecopedagogy and environmental education are intertwined. *Prima facie*, they could be considered synonyms, yet Gadotti recommends broadening the view: ecopedagogy entails a certain set of environmental values—such as the preservation of biodiversity—but also understands that environments play a role in learning processes.<sup>49</sup> Education science might focus on the role of context and deal with it as a seemingly neutral concept; however, all

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<sup>45</sup> Alice Stefanelli, ‘The Afterlife of Anthropological Teaching’, *Journal* 7, no. 1 (31 August 2017): 4–14, <https://doi.org/10.22582/ta.v7i1.456>.

<sup>46</sup> Stefanelli, 9.

<sup>47</sup> Stefanelli, 9.

<sup>48</sup> Samuel S. Wineburg, ‘Historical Problem Solving: A Study of the Cognitive Processes Used in the Evaluation of Documentary and Pictorial Evidence.’, *Journal of Educational Psychology* 83, no. 1 (March 1991): 77, <https://doi.org/10.1037/0022-0663.83.1.73>.

<sup>49</sup> Moacir Gadotti, ‘Reorienting Education Practices towards Sustainability’, *Journal of Education for Sustainable Development* 4, no. 2 (2010): 203–11, <https://doi.org/10.1177/097340821000400207>.

contexts and educational settings always enjoy an environmental dimension.<sup>50</sup> Teachers could be construed as niche constructors<sup>51</sup> and the more humanity tips the scales towards its self-empowerment, the greater the responsibility and the need for purposeful action on its behalf.<sup>52</sup>

Thusly understood, ecopedagogy enjoys an interdisciplinary character,<sup>53</sup> consistently with the fact educational processes are always multi-layered.<sup>54</sup> Hence, what could be an epistemologically sound way to investigate educational processes in an ecopedagogical perspective? A Freire-inspired approach would be suggestive but, as Taylor showed, it would not lend itself to a systematic analysis.<sup>55</sup>

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<sup>50</sup> Mirca Benetton, 'Diffondere la cultura della sostenibilità: ecopedagogia a scuola fra vecchi e nuovi paradigmi educativi', *Pedagogia Oggi*, no. 1 (2018), <https://doi.org/10.7346/PO-012018-19>; Liliana Dozza, 'Co-costruire pensiero ecologico per abitare la Terra / Co-building an ecological mindset for living gently on planet Earth', *Pedagogia Oggi* 16, no. 1 (2018): 193–212, <https://doi.org/10.7346/PO-012018-13>.

<sup>51</sup> Andrea Mattia Marcelli, 'Developmental Niche Construction in Education Sciences: Epistemological Considerations and Anthropological Evidence on Its Outcomes for Community Education', *Formazione & Insegnamento* 18, no. 4 (2020): 11–25, [https://doi.org/10.7346/-fei-XVIII-04-20\\_01](https://doi.org/10.7346/-fei-XVIII-04-20_01).

<sup>52</sup> Silvia Peppoloni and Giuseppe Di Capua, 'Geoethics as Global Ethics to Face Grand Challenges for Humanity', *Geological Society, London, Special Publications* 508, no. 1 (January 2021): 13–29, <https://doi.org/10.1144/SP508-2020-146>.

<sup>53</sup> Raffaella Carmen Strongoli, 'Ecopedagogica. Una proposta di educazione ecologica', *Ricerche di Pedagogia e Didattica. Journal of Theories and Research in Education* Vol 14 (19 December 2019): 221-243 Pages, <https://doi.org/10.6092/ISSN.1970-2221/9890>.

<sup>54</sup> Pierluigi Malavasi, 'Sviluppo umano integrale, pedagogia dell'ambiente, progettazione educativa sostenibile', in *Progettazione Educativa Sostenibile: La pedagogia dell'ambiente per lo sviluppo umano integrale*, ed. Pierluigi Malavasi (Milano: EDUCatt, 2010), 65–76, <http://hdl.handle.net/10807/5330>.

<sup>55</sup> Paul V. Taylor, *The Texts of Paulo Freire* (Buckingham ; Philadelphia: Open University Press, 1993).

### 3.2. Pilot investigation: ‘our bones dive deep into the sea’<sup>56</sup>

Drawing on the previous section, the present one will endeavour to build an autonomous analytic framework based on the appreciation of the degrees of human agency and its understanding of the environment. It will then show a case of its application to environmental learning in a maritime community. Again, the focus is on the environment, but the ecopedagogical dimension that emerges does not necessarily reflect a ‘conservationist’ view of it—or, at least, not expressly, even if it deals with the topic of fisheries. Rather, the guiding questions will bear on what the environment *does* for learning and how learning processes *reflect* a certain understanding of the environment. The proposed interpretive framework aims to answer such questions from an ecosystemic perspective that is inspired by the technical aspects of Niemi’s learning ecosystems<sup>57</sup> but is better aligned with the values of Ellerani’s manifesto<sup>58</sup> and Minello’s interpretation of the role of context in education.<sup>59</sup>

#### 3.2.1. “When the sea is rough”

“The middle-aged man shrugged: ‘Nobody does it anymore, nowadays.’  
‘...And was it dangerous?’ I dared to ask, though I knew the answer already.  
‘Many...’ He struggled with his memories: ‘Well, *some* died. It was tragic.’  
‘How came?’

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<sup>56</sup> An unrevised version of this section was presented at the 2021 conference ‘Educazione, Territori, Natura’ and will be published in the forthcoming conference proceedings as Andrea Mattia Marcelli, “‘Os Nossos Ossos Mergulham No Mar’”: Azorean Existential Experiences as a Case for Ecopedagogy’, in *ETN21*, ed. Liliana Dozza, Michele Cagol, and Monica Parricchi (Educazione, Territori, Natura, Zeroseiup, forthcoming).

<sup>57</sup> Hannele Niemi, ‘Education Reforms for Equity and Quality: An Analysis from an Educational Ecosystem Perspective with Reference to Finnish Educational Transformations’, *Center for Educational Policy Studies Journal* 11, no. 2 (23 June 2021): 13–35, <https://doi.org/10.26529/cepsj.1100>.

<sup>58</sup> Piergiuseppe Ellerani, ‘Verso una formazione ecosistemica, come logica della vita’, *Formazione & insegnamento* 18, no. 1 (31 March 2020): 1–5, [https://doi.org/10.7346/-fei-XVIII-01-20\\_01](https://doi.org/10.7346/-fei-XVIII-01-20_01).

<sup>59</sup> Rita Minello, ‘Tessitori di tele d’acqua: L’incontro tra talento, luogo e contesto’, *Formazione & insegnamento*, no. 1 (2019), [https://doi.org/10.7346/-FEI-XVII-01-19\\_13](https://doi.org/10.7346/-FEI-XVII-01-19_13).

He pointed somewhere to the West: ‘Up there the cliff is much higher and, when the sea is rough, it can get quite dangerous. But people who use to do this... they were hungry’.”<sup>60</sup>

This exchange with an informant proves indeed Neilson et al.’s points.<sup>61</sup> Nothing strikes like the empirical when it punches you in the face, at least metaphorically. So, there I was, back in the field, feeling like an experimenter who had just replicated the results of his predecessors and could see them distinctively on the petri dish. But Ilha Terceira—which lies in the North-Eastern Atlantic Ocean, among her four other sisters from the Central Group of the Azores—is no dish: not just because of its rough terrain and edgy cliffs but also because the Azores have never been isolated in the romantic sense of the term, at least since their first appearance in European history.<sup>62</sup>

The attempt to treat islands as controlled enclosures is a notorious methodological bias,<sup>63</sup> which hinders the understanding of the fact such patches of inhabited land (the Azores) have lied at the crossroads of countless maritime routes<sup>64</sup> and placed themselves twice at the centre of ideological and identarian struggles. First, in the centuries-old conflict between the

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<sup>60</sup> Andrea Mattia Marcelli, “‘The Middle-Aged Man Shrugged’...” (Field journal, 12 May 2022).

<sup>61</sup> Alison Laurie Neilson et al., ‘Speaking of the Sea in the Azores Islands: We Sometimes Went for Lapas’, in *Heritages and Memories from the Sea, 1st International Conference of the UNESCO Chair in Intangible Heritage and Traditional Know-How: Linking Heritage 14-16 January 2015, Évora, Portugal*, ed. Filipe Themudo Barata and João Magalhães Rocha (Évora: University of Évora, 2015), 118–31, <http://hdl.handle.net/10316/84822>.

<sup>62</sup> João Carlos Abreu, ‘Na ilha respiro a liberdade da vida’, in *A condição de ilhéu*, ed. Roberto Carneiro, Onésimo Teotónio Almeida, and Artur Teodoro de Matos, Coleção Estudos e documentos 22 (Lisboa: Centro de Estudos dos Povos e Culturas de Expressão Portuguesa, Universidade Católica Portuguesa, 2017), 175–79.

<sup>63</sup> Yaso Nadarajah et al., ‘Critical Reflexivity and Decolonial Methodology in Island Studies: Interrogating the Scholar Within’, *Island Studies Journal* 17, no. 1 (May 2022): 3–25, <https://doi.org/10.24043/isj.380>.

<sup>64</sup> Vera Duarte, ‘Condição de ilhéu’, in *A condição de ilhéu*, ed. Roberto Carneiro, Onésimo Teotónio Almeida, and Artur Teodoro de Matos, Coleção Estudos e documentos 22 (Lisboa: Centro de Estudos dos Povos e Culturas de Expressão Portuguesa, Universidade Católica Portuguesa, 2017), 327–38.

Portuguese and the Spanish Crown; second, in the later contemporary civil war for the establishment of constitutionalism.<sup>65</sup>

“*Os nossos ossos mergulham no mar* [our bones plunge into the sea].”<sup>66</sup> By choosing this quote, Luz<sup>67</sup> touches on at least three dimensions of the Azorean existential landscape. First, the obvious connection between the islanders and the sea, which inevitably dominates a relevant part of their daily lives. Second, the tragic fate of the pickers of *lapas* (sea snail collected for human consumption: *Patella aspera* or *Patella candei gomesii*) or of the many others who lost their lives at sea for one reason or another. Third, the perception of Azorean life through the lenses of one of the most celebrated crafters of its identity—Vitorino Nemésio. As participant observation revealed, Nemésio is not just valued in the Azores—and Terceira in particular—because of the direct effects of his writings on Portuguese culture and the collective imaginary of his fellow islanders<sup>68</sup> but also because he plays the role of a trump card, which is occasionally played in conversations concerning the way islanders see themselves.

But Nemésio did not limit himself to the appreciation of the sea. In the words that immediately precede the above quote, he states: “As mermaids have a double nature: we are flesh and stone.”<sup>69</sup> In fact, he talks of rocks and quakes as the other pillar of Azorean identity:

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<sup>65</sup> Barbora Mrázková, ‘A valorização da posição geo-estratégica do arquipélago dos Açores entre séculos XV e XXI’ (Brno, Masaryk University, 2011), <https://is.muni.cz/th/jks4t/>.

<sup>66</sup> Vitorino Nemésio, ‘Açorianidade’, *Insula* Número Especial Comemorativo do V Centenário do Descobrimento dos Açores, no. 7–8 (1932): 59.

<sup>67</sup> José Luís Brandão da Luz, ‘Ser ilhéu dos Açores: O mar e o isolamento como desafios’, in *A condição de ilhéu*, ed. Roberto Carneiro, Onésimo Teotónio Almeida, and Artur Teodoro de Matos, Coleção Estudos e documentos 22 (Lisboa: Centro de Estudos dos Povos e Culturas de Expressão Portuguesa, Universidade Católica Portuguesa, 2017), 269.

<sup>68</sup> Antônio João Silvestre Mottin, ‘Vitorino Nemésio: homem culto - sementeiro de cultura’, *Letras De Hoje* 33, no. 3 (1998), <https://revistaseletronicas.pucrs.br/ojs/index.php/fale/article/view/15110>.

<sup>69</sup> Nemésio, ‘Açorianidade’, 59.

threatening grounds, which shape themselves continuously and put human beings in contact with the energy of geological forces at play. This sentiment is echoed in Cristóvão de Aguiar's lyrics,<sup>70</sup> sung in 1969 by Duarte e Ciriaco:

“The beach was filled with screams  
From the people of my village  
When they saw Zé's body  
Washed up by the high tide.

Voices are heard: ‘Poor thing!  
Five children and wife  
Without a crust of bread,  
Without even a shelter!’.”<sup>71</sup>

In this tragic story, which plays along the tunes of the *Charamba*,<sup>72</sup> the corpse of a fisherman is washed ashore by the sea: his untimely death leaves a numerous family deprived of resources for their subsistence.

### 3.2.2. *Heuristic framework: an analytical continuum*

Drawing on Nemésio, I seized the opportunity to wonder whether cultural heritage could be understood in a similar way. After all, in the third sense elicited by my hermeneutics of Luz's choice,<sup>73</sup> what seems to be at stake is not the geography itself but the identity of a people, which is apt at self-descriptions and enjoys a wealth of authors of all backgrounds that contributed to a common self-directed discourse.<sup>74</sup> If culture is understood as a process rather than a fixed set of elements, it means heritage functions as a medium for the construction of

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<sup>70</sup> Cristóvão de Aguiar, *Mãos vazias: poemas* (Livraria Almedina, 1965).

<sup>71</sup> Duarte & Ciriaco, *Naufrágio*, Vinyl, 7", 45 RPM, EP, Nós: Canções Populares (Sonoplay, 1969).

<sup>72</sup> ‘Charamba’ is a musical genre that originated in Madeira. See Élia de Sousa, ‘Charamba, Em Busca de Um Futuro’, in *Questões de Identidade Insular Nas Ilhas Da Macronésia*, ed. Duarte Nuno Chaves (Ponta Delgada: CHAM – Centro de Humanidades, Faculdade de Ciências Sociais e Humanas da Universidade Nova de Lisboa e Universidade dos Açores; DRC – Direção Regional de Cultura da Madeira; CEHA – Centro de Estudos de História do Atlântico Alberto Vieira, 2019), <http://hdl.handle.net/10400.3/5100>.

<sup>73</sup> Luz, ‘Ser ilhéu dos Açores: O mar e o isolamento como desafios’.

<sup>74</sup> Kiwamu Hamaoka, ‘A Instabilidade Estruturada’ (Lisboa, 1995).



representations of the self and others. Therefore, Terceira appears as a fertile ground to detect and perchance witness said process at work.

However, drawing on a bold analogy with physics, processual phenomena could hardly be grasped through the measurement of a single indicator: if we single out a specific historical time frame, we obtain a snapshot of a *status quo* but lose the opportunity to appreciate change; conversely, if we focus on the occurring change, we miss the understanding of historical stability.<sup>75</sup>

To compensate for such difficulties, I opted to outline an interpretive framework. Metaphorically, it follows from Nemésio's idea on the duality of Azorean existence, which almost amounts to a native theory, and is thus in line with the field where the study took place. Realistically, it attempts to overcome the nature–nurture dichotomy by positing a continuum that goes from what is least negotiable to what could be changed at whim—in a way that is compatible with Giddens' "Structuration Theory".<sup>76</sup>

Depending on the depth of the cultural historical study, such continuum could be divided into discrete categories—on pain of the awareness that it is but a reductionist rendering of a blurred reality. The division could be as follows:

- Phenomena with a high degree of non-negotiability.
- Phenomena that are negotiable in the long term.
- Phenomena that are negotiable in the short term.

For example, the least negotiable elements could be some aspects of human biology, such as the fact we tend to be all born with a spine. Instead, other aspects are subject to change but

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<sup>75</sup> For the use of similar metaphors concerning the philosophical stances towards the distributed nature of human intentionality, see Barad (2006).

<sup>76</sup> Isabel Dyck and Robin A. Kearns, 'Structuration Theory: Agency, Structure and Everyday Life', in *Approaches to Human Geography*, by Stuart Aitken and Gill Valentine (1 Oliver's Yard, 55 City Road, London EC1Y 1SP United Kingdom: SAGE Publications Ltd, 2006), 86–97, <https://doi.org/10.4135/9781446215432.n7>.

are not determined by a single person: cultural traits are usually placed in this category. Finally, there are things that depend on individual behaviour and are subject to wider local variability.

The above categories are meant to be *in re* and reflect a realist approach to phenomena. However, anthropology teaches that all such instances are culturalized to some extent—even those of physical geography such as the mountains or the sea—that is, a matter of concern for the semiotics of nature, such as what was examined by Nöth and Kull.<sup>77</sup> In fact, nature itself could be understood as a social construct.<sup>78</sup> This diversifies the way phenomena are featured in narratives and representations: for example, millenarianism assumes that some physical aspects of the universe will soon give way to an otherworldly reality; conversely, a ‘tradition’ that is only a decade-old could be understood as immutable and be mandatorily enforced. Hence, in a culturalist perspective, the above three categories could be reworked to accommodate not the way things *are* (even assuming a nomothetic science could unveil things in themselves) but the way things *are pictured*. Dealing with something as ‘immutable’ is informative of the way a people or a community *makes sense* of the world—and is one of the basic processes through which heritage is alternatively forged and melted.

### 3.2.3. Application: environmental learning in a maritime community

The cultural interplay of the above categories has direct effects on individual and communal lifestyles. Therefore, if we can show their alignment with specific learning outcomes, it is

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<sup>77</sup> Winfried Nöth and Kalevi Kull, ‘Introduction: Special Issue on Semiotics of Nature’, *Sign Systems Studies* 29, no. 1 (31 December 2001): 9–11, <https://doi.org/10.12697/SSS.2001.29.1.01>.

<sup>78</sup> Anne Alencar Monteiro, ‘Cavalos-marinheiros: Uma análise etnográfica sobre masculinidades que engravidam’, in *Teorias da natureza: etnografias da Bahia*, ed. Paride Bollettin and Charbel Niño El-Hani, Prima edizione, Encounters 01 (Padova: CLEUP, 2020), 11–30.

possible to put forward informed claims on how the heritage of a given community informally affects learning—that is, assuming such heritage is articulated in at least those three dimensions.

In this section, I apply the framework to *lapas* as a cultural referent. In this respect, this novel interpretation bears on ethnographic data collected by Neilson et al. since their research shows *lapas* enjoy a spot in both informal and formal education processes—even though their paper does not make use of such terminology.<sup>79</sup> A summary of their findings follows and is reframed according to the continuum; occasionally, their findings are integrated with information from my own fieldwork.

Ethnographic data show that, in the early Twentieth Century, the *sea* was seen as both a resource and a threat. It provided fish and wealth through the merchant routes, but it also swallowed the lives of many. For the poorest, it happened to be the *only* source of income since livestock farming required land and a capital to begin with. Thus, as the individuals interviewed by Neilson et al. recount, those who could afford a boat would go fishing, but those who could not afford it would become pickers of limpets and molluscs. Some of my informants from the *freguesia* of Santa Bárbara reported to me that such pickers would walk miles—often barefoot—and knock at each door, displaying their baskets full of *lapas*. This is suggestive of a market economy. However, most often than not, their activity was mere subsistence and, as further reported by Neilson et al., it involved interactions between different generations, which in turn generated alternative learning experiences: some parents would bring their offspring with them; others would send the children alone, as they tended to other household or farming chores; finally, there were some parents who forbade their children from engaging in the activity *at all*—expressly because of its inherent danger.

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<sup>79</sup> Neilson et al., ‘Speaking of the Sea in the Azores Islands: We Sometimes Went for Lapas’.

Such *mise en scène* fits the framework in the following way. The sea acts as the non-negotiable element: it is mutable, of course, but not because of human actions; being temperamental, it is traditionally viewed as a source of relative wealth but also as a hazardous element to come to terms with. Subsistence based on the maritime economy plays the role of the long-term negotiable element: the Azoreans saw themselves as seafaring people, even if a great deal of the islands' economy—and Terceira's in particular—depended on breeding cattle in the close fields. Since social shifts were not ensured, the sea came up again as a major player in favouring intergenerational change: the youths would board ocean liners to seek fortune in the Americas, thus driving what is now known as the Azorean diaspora.<sup>80</sup> Finally, we see parental choice as the most direct and negotiable aspect concerning the collection of limpets: 'going for *lapas*' could either be a way to teach a foraging skill or to strengthen the parental bond—both positively (through mentoring) or negatively (through estrangement or prohibition).

Moving forward along the diachronic axis, ethnographic data show a transformed framework of meanings. The sea, once immutable, is now understood as a depleted resource—owing to human action. This is made evident by processed data<sup>81</sup> but direct proof of the ricochet on fishing activities could be directly seen in São Mateus, one of the fishing harbours of the island: although some traditional *barcos* [boats] are still lined up by the pier, the most relevant fishing is carried out through motorboats, whose owners follow regional regulations. Fishing is more efficient now, but the time window is reduced. After the over-harvesting of

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<sup>80</sup> Gilberto Fernandes, *This Pilgrim Nation: The Making of Portuguese Diaspora in Postwar North America* (University of Toronto Press, 2019), <https://doi.org/10.3138/9781442630673>.

<sup>81</sup> Paulo Torres et al., 'Risk Assessment of Coastal Fisheries in the Azores (North-Eastern Atlantic)', *Fisheries Research* 246 (February 2022): 106156, <https://doi.org/10.1016/j.fishres.2021.106156>.

the 1980s,<sup>82</sup> *lapas* have become a protected species and could be lawfully collected only in the summer season.<sup>83</sup>

Additionally, since the Second World War the Azorean mean income has been steadily increasing, and the dependency of single households on the whims of the sea is now greatly reduced.<sup>84</sup> With different source of income came different occupations and the fishing industry, though more efficient, ended up employing a lower share of the workforce. This, mixed with environmental concerns and a greater attention towards tourism, transformed traditional fishing activities into attractions for the occasional visitor or the Azorean native who would like to enjoy a day in the open. The websites advertise: “[Be] Fisherman for a Day in Terceira Island.”<sup>85</sup>

It is thus interesting to see how the above late-Twentieth Century elements align to influence learning outcomes. As noted by Neilson et al., the concept of *lapas*—and sea life in general—is funnelled through formal education processes, governed by institutions such as primary schools.<sup>86</sup> Children do not pick limpets anymore but are made to sing about them to get acquainted with the diversity of marine life. The former conflicted paradigm has now given way to a sanctuary view of nature, which is perceived in the intentions of teachers as functional to the understanding of its intrinsic value as well as the value of its preservation.

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<sup>82</sup> Ricardo Serrão Santos, Rodrigo Delgado, and Rogério Ferraz, ‘Background Document for Azorean Limpet *Patella Aspera*’, Background document, Biodiversity Series (London: OSPAR Commission, 2010), <https://www.ospar.org/work-areas/bdc/species-habitats/list-of-threatened-declining-species-habitats/invertebrates/azorean-limpet>.

<sup>83</sup> Assembleia Legislativa Região Autónoma dos Açores, ‘Decreto Legislativo Regional n.º 15/2012/A, de 2 de abril’, Pub. L. No. 15/2012/A (2012), <https://data.dre.pt/eli/declegreg/15/2012/04/02/a/dre/pt/html>.

<sup>84</sup> Rodolgo Marques Santos, ‘Análise da evolução recente do setor das pescas nos Açores’ (Universidade dos Açores, 2018), <http://hdl.handle.net/10400.3/4683>.

<sup>85</sup> SAPO Viagens, ‘Açores: Ser Pescador por um Dia na Ilha Terceira. SAPO’, 7 August 2016, <https://viagens.sapo.pt/viajar/viajar-portugal/artigos/acoes-ser-pescador-por-um-na-ilha-terceira>.

<sup>86</sup> Neilson et al., ‘Speaking of the Sea in the Azores Islands: We Sometimes Went for *Lapas*’.

Some of the secondary school teachers I interviewed expressed doubts concerning the families' abilities to convey adequate knowledge about local resources and practices. Current upbringing habits bring about contradictions in children education. The typology ranges from youths grown in rural areas but who participate in household activities only for a fraction of their free time to seemingly 'urbanized' youths that entertain little to no connections to the productive activities that take place on the island—including fishing. Such view clashed with that of Terceiran youths as more engaged with nature than their continental counterparts. Yet, my informants claimed the contradiction is only apparent: it is true that the island offers several opportunities to learn a trade in the farming or fishing industry, so that rural-minded youths tend to be more conscious of the environment; however, the gap is widening between those who 'keep in touch with nature' and those who do not. This—teachers claim—is why only carefully designed education programmes could salvage what is left of the local heritage. But, of course, teachers do not intend to convey only memories or to return their pupils to a subsistence economy: traditional practices would inevitably serve contemporary goals, such as that of raising environmental awareness.

#### *3.2.4. Conclusions of the pilot investigation*

My assumptions in this Chapter are that an ecopedagogical perspective on learning requires an epistemologically sound interpretive framework. An ecological view is not merely environmental in spirit but takes into account the way the interplay of different contextual elements results in the achievement of learning goals. To detect such interplay, I proposed a framework based on the appreciation of how a community perceives the negotiability of different environmental traits. Ethnographic data corroborate the usage of the framework to understand how environmental learning takes place.

### 3.3. Main study: materials and methods

#### 3.3.1. Anthropological positioning

By talking of investigation and action I do not mean to support the “theory-practice dichotomy.” Scholars such as Taguchi recognize the latter as the result of a “modernist logocentric inclusionary or exclusionary thinking.”<sup>87</sup> Instead, I abide by the Gadamerian critique of the “modern divide between theory and practice,” which, according to Walhof, entails the acknowledgment that “social and political affairs necessarily involve contextualized judgments about both ends and means.”<sup>88</sup>

However, I do maintain that, in order to plan educational intervention, one must first gather information concerning a given setting. That is also the first tenet of Misiaszek, as outlined in *Chapter 2*. Moreover, even if knowledge, in the predicative sense of the term, is developed concurrently with the inclusion of the knowing subject within specific practices and activities that belong to her communities of interest, the two elements—that is, knowledge and action—are ontologically distinct components of a given process. Thus, in retrospective—but not *in rebus*<sup>89</sup>—my research could be understood as an attempt to reveal a bottom-up pedagogical construction in a given geographical setting, with the goal of acquiring and disseminating new perspectives. These epistemological concerns are thusly reflected in my field diary, in one of those reflective passages that approximate a literary construction of the anthropological self:

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<sup>87</sup> Hillevi Lenz Taguchi, ‘Deconstructing and Transgressing the Theory—Practice Dichotomy in Early Childhood Education’, *Educational Philosophy and Theory* 39, no. 3 (January 2007): 279, <https://doi.org/10.1111/j.1469-5812.2007.00324.x>.

<sup>88</sup> Darren R. Walhof, *The Democratic Theory of Hans-Georg Gadamer* (Cham: Springer international publishing, 2017), 10.

<sup>89</sup> For an artist’s impression of the concept, see Gabriele Baretin, *In Due [The Double of Myself]*, In Rebus (Rome: Funky Juice, 2012), <https://www.youtube.com/watch?v=TL9Kjf90S8Y>.

“By positioning myself within the ecopedagogy movement, I face challenges concerning the usage-as-usual of key epistemological terms. Seemingly unambiguous expressions, such as ‘researcher,’ ‘investigator,’ ‘knower,’ ‘subject,’ and ‘participant’ now reveal their teetering nature, owing to a break-even between arbitrary language choices and convenience.

Foucauldian genealogy reveals that all individuals that construct themselves as knowing subjects are far from being neutral contemplators that admire the world from their ivory tower. Rather, by attributing to themselves a neutral placement, they are in fact appointing themselves as judges of reality and as the owners of truth-making processes.

Such awareness is inconvenient for the modernist researcher, which feels defrauded of his privileged pedestal. However, it unlocks a series of opportunities for the post-modern investigator, who finds herself in a position to deal pragmatically with the challenges of reality. Indeed, as she acknowledges the relativity of her position both in physical and social terms, she gains the advantage of relating with the world according to *real* frames of reference, rather than *ideal* ones. At first, this way of doing upsets her, but after a while she begins to acknowledge that her direction will be clear as long as she moves by keeping something or somebody else in her scope.

In a social setting, for example, knowledge gathering is always cooperative. Actually, the very category of ‘gathering’ should be subjected to scrutiny: it gives the stereotypical impression of information being ‘out there’—that is, ‘up for grabs’—and ready to be profited from. But this is hardly the case. Of course, through her inclusion, a researcher might become acquainted with facts that have little impact on her present condition, as well as that of her informants. Nonetheless, information always results from a competence: the ability to use data in a consistent and productive way. Knowing the location of a building is a datum but using such datum to plan a route to reach the building is an activity that deploys information—that is, data become means to an end.

And yet, even if such seemingly archival information could be obtained through the social inclusion of the researcher in a given community, in most cases information is not just delivered to her, but *co-constructed*. Conversations, participations to event: all of them contribute to the establishment of a new social reality, which shifts the barycentre of the researcher from the usual comfort zone to an area of development.

During immersion in the field, the individual’s subjectivity is under siege. Although welcoming, the surrounding foreign environment impresses with the strength of its numbers: after all, the investigator is *one*, whereas the hosting community is *many*. This should put the researcher back in place and shave off the aura of arrogance that usually accompanies all modernist endeavours.

In other words, she came to the field with the goal of knowing an object of research. Instead, she found only subjectivities there and, to develop that very knowledge, she had to change and transform herself in unprecedented way. One might get accustomed to such metamorphoses of the self and learn how to cope with them. However, they are always epistemologically unsettling—and rightfully so, because the *ideal* frame of reference has never been there with its consolatory presence; rather, it was just the shadow of the inquirer’s own ethnocentrism... or even self-centrism.

At the outset, I felt I had to justify my contemplative view. That is, had my work turned out to be *too* academic—in the ‘predicative knowledge’ sense of the term—I could have excused myself by claiming that the ethnographic observation is but a step of a longer process. ‘You know, it is part of a bigger plan.’ Why excusing myself?



Because I felt I was not intervening enough. I felt I was acting as an observer, rather than an educator. Can an observer of education be an educational scientist in the ecopedagogical sense of the term? Not really, because ecopedagogy requires enmeshment, action, and starting up learning processes that tackle global challenges. Who was I, then? Just a painter taking advantage of foreign soil? A thought arose: I was underestimating the holistic scope of ecopedagogical research. ‘Of course—I told myself—there are some projects that lean more towards action-research. However, even if I am *used* to think of my presence on the field as mere contemplation, this is just a sophisticated form of self-deception I have become accustomed to because of the modernist load academics carry by themselves.’  
Indeed, experience on the field made me realize that everything that happens is, in fact, *action*. Not necessarily in the sense of creating new educational settings, but look where I am: here, walking the streets of a remote island, talking in a language I have struggled with in the past, and collecting testimonies from people who might have not otherwise spoken—or, if they would have anyway, the experience would not have been the same.”<sup>90</sup>

The above passage could be summarized as follows. Even if the academic endeavour results in a dissertation featuring predicative knowledge, this does not subtract from the fact that knowledge is always the result of action in the field. As Gärtner puts it, we give for granted that ‘knowledge workers’ are not involved in bodily and active experience, but this is just a cliché that overlooks the reality of on-the-job tasks.<sup>91</sup> Moreover, even if the research did not result in the creation of new educational settings on the field, it does not mean it did not serve the other purposes Misiaszek lists for ecopedagogical research.<sup>92</sup>

Compared to the level of engagement of ecopedagogists, the choice of adopting ethnographical research stands as a more cautious approach. However, what is epistemologically relevant is that ethnography is not *a priori* excluded by ecopedagogy. This is one of the outcomes of the above reflection, but it also results from debates concerning the presence of researcher in the field.

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<sup>90</sup> Andrea Mattia Marcelli, ‘By Positioning Myself within the Ecopedagogy Movement...’ (Field journal, 20 May 2022).

<sup>91</sup> Christian Gärtner, ‘Cognition, Knowing and Learning in the Flesh: Six Views on Embodied Knowing in Organization Studies’, *Scandinavian Journal of Management* 29, no. 4 (December 2013): 346, <https://doi.org/10.1016/j.scaman.2013.07.005>.

<sup>92</sup> Misiaszek, ‘Ecopedagogy and Citizenship in the Age of Globalisation’.

A classic critical attitude towards overly engaged researchers is painted in a reflective piece by Hale, who undertakes “activist research” on a seemingly regular basis.<sup>93</sup> In the article, Hale explores the merits and flaws of activism: by positioning oneself within an activist scope, the researcher is compromised; however, *without* engaging in activism, it would not be possible to gain “insight that otherwise would be impossible to achieve.”<sup>94</sup> Social researchers are thus faced with an epistemological choice on how they should situate themselves:

“Scholars who practice activist research have dual loyalties—to academia and to a political struggle that often encompasses, but always reaches beyond, the university setting; proponents of cultural critique, by contrast, collapse these dual loyalties into one. Cultural critique strives for intellectual production uncompromised by the inevitable negotiations and contradictions that these broader political struggles entail.”<sup>95</sup>

Although, here, I do not engage in activist research, I would not go to the extent of claiming that my “intellectual production” is “uncompromised.” That is, because fieldwork experience *required* a lot of compromises, which I will outline in the following section.

### 3.3.2. *Issues in fieldwork accessibility*

My first trip to Terceira Island dates February-March 2020. When I Rome, I had the opportunity to assist Francisco Sousa, a Portuguese Professor (and future co-author) during his February 2020 Erasmus+ Mobility. One February 12, at dinner, he disclosed to Professor Marxiano Melotti, my *sensei*, that Terceira Island had a specific type of Carnival. Melotti, owing to his long-lasting experience as a Carnival scholar,<sup>96</sup> immediately recognized the

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<sup>93</sup> Charles R. Hale, ‘Activist Research v. Cultural Critique: Indigenous Land Rights and the Contradictions of Politically Engaged Anthropology’, *Cultural Anthropology* 21, no. 1 (February 2006): 96–120, <https://doi.org/10.1525/can.2006.21.1.96>.

<sup>94</sup> Hale, 98.

<sup>95</sup> Hale, 100.

<sup>96</sup> Marxiano Melotti, *Carnevalizzazione e Società Postmoderna: Maschere, Linguaggi, Paure*, Prima edizione, Il Paese Di Cuccagna (Bari: Progedit, 2019).

singularity of the feast Sousa was describing. In his own words, he told me it did not sound like anything he had heard or seen before.<sup>97</sup>

Unfortunately, Carnivals and feasts in general are an ugly affair for the anthropologist: they happen only once a year. Therefore, if you attend one event you cannot attend the other. That was precisely the situation Melotti was in, so I offered to go to Terceira Island myself and collect some preliminary data. The clock was ticking, and decisions were to be taken swiftly, because the Carnival was going to start very soon. In less than a week, and, sadly, in spite of Bianco's recommendation preparation is made in advance,<sup>98</sup> I arranged my first fieldwork trip. At least, I followed Handwerker's suggestion: "study topics you feel passionate about."<sup>99</sup> My first stay lasted from February 19 to March 2, 2020. At that time, I had no idea that was going to be the my last opportunity to attend Terceira's Carnival. The subsequent series of restriction enacted after the pandemic outbreak reached Europe caused not only a disruption in travel for the following year, but also the decision of Terceira Island's local administrations to cancel the Carnival not once, but twice. In February 2021, news outlets would title: "Terceira Island's Carnival passed with sadness."<sup>100</sup> In February 2022, the news was repeated: "The Carnival of Terceira Island, in the Azores, will not be realized for the

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<sup>97</sup> Only later, after I recorded a quick remark by Terceira's *cantador* José Eliseu Mendes Costa in May 2022, we all realized that there is *at least* one European Mainland feast that possibly bears strong similarities with what happens in Terceira Island: that is, the Carnival of Cadiz. A comparative study is thus in the making. For an outlook of the Carnival of Cadiz see, e.g., Estrella Fernández Jiménez, 'El Proceso Creativo de Las Agrupaciones Carnavalescas de Cádiz.', *Vivat Academia*, no. 153 (3 December 2020): 29–53, <https://doi.org/10.15178/va.2020.153.29-53>.

<sup>98</sup> Carla Bianco, *Dall'evento al documento: Orientamenti etnografici*, 2nd ed., *Materiali e studi demoetnoantropologici* (Roma (IT): CISU, 1994), 51–52.

<sup>99</sup> W. Penn Handwerker, *Quick Ethnography* (Walnut Creek, CA: AltaMira Press, 2001), 37.

<sup>100</sup> Lusa, 'Carnaval da ilha Terceira passado com tristeza e de olhos postos em 2022', *RTP Notícias*, 12 February 2021, sec. Cultura, [https://www.rtp.pt/noticias/cultura/carnaval-da-ilha-terceira-passado-com-tristeza-e-de-olhos-postos-em-2022\\_n1296999](https://www.rtp.pt/noticias/cultura/carnaval-da-ilha-terceira-passado-com-tristeza-e-de-olhos-postos-em-2022_n1296999).

second consecutive year, owing to Covid-19, but despite fears about the possible impacts of the interregnum, those who participate in it believe that continuity is assured.”<sup>101</sup>

This was very inconvenient, as I had planned to make it the pivotal heritage event of my doctoral dissertation. Nonetheless, mindful of Hagberg and Körling remarks on the tricky nature of “inaccessible fields,”<sup>102</sup> I endeavoured to make the best of what was left. Of course, in an ontological perspective, my situation was rather different: the field was not just inaccessible: events did not take place at all. Another limiting factor was that my job would not allow me to leave my country during teaching terms, which furtherly complicated potential fieldwork arrangements. Paired with lack of funding, it seemed my ethnographic experience was close to be irreversibly over. The inaccessibility of the field and the unavailability of my object of inquiry oriented me towards theoretical research, of which *Chapter 2* is the result, which I hope compensates my earlier neglect of Bianco’s recommendations on early planning.<sup>103</sup> As my theoretical repertoire grew, the research became not just an investigation concerning Terceira’s Carnival; rather, Terceira’s Carnival became an excuse to discuss community ties and bonds. Eventually, the educational scope emerged, with the identification of the mapping of intangible cultural heritage practices with one of the key steps of ecopedagogy.

Later, as Sars-CoV-2 restriction eased somehow, I was finally able to return to Terceira Island on two additional occasions. The first time was between July 21 and August 1, 2021. The second time was between April 30 and May 21, 2022. Both stays were productive, but the latter bore better results.

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<sup>101</sup> Lusa.

<sup>102</sup> Sten Hagberg and Gabriella Körling, ‘Inaccessible Fields: Doing Anthropology in the Malian Political Turmoil’, *Anthropologie & Développement*, no. 40–41 (1 September 2014): 143–59, <https://doi.org/10.4000/anthropodev.308>.

<sup>103</sup> Bianco, *Dall’evento al documento: Orientamenti etnografici*, 52.

My 2021 fieldwork was characterised by ashen skies and difficult interactions. I tried to analyse my difficulties with people. Part of that was due to my language skills. Part of that was due to the general stagnation that dominates the summer months. Part of that was due to the suspicious atmosphere created by a resurgence of the pandemic threat. However, I believe the greatest factor was the fact I insisted on ‘going rogue,’ without the assistance of my Azorean friends, who had accompanied me throughout my 2020 stay—and without whom I would not have been able to see an inch of the Carnival. Eventually, things got better thanks to my acquaintance with two elderly brothers involved in *touradas*, which provided me valuable information—part of which is reflected in *Chapter 2*’s fieldwork examples. I have also had an opportunity to increase my language proficiency and my knowledge of the island’s transport network: in 2020, I was travelling by car; in 2021, I was only using buses. However, it was my 2022 fieldwork that really turned the table on my earlier misfortunes. Be it spring or the perceived end of the pandemic threat, Terceira Island was reborn. My Portuguese was better, and I had most of my theoretical research behind me. I was finally able to find again the cheerfulness, good-heartedness, and availability that had struck me on my first arrival on the Island, two years before. I had set myself to collect some interviews and participate in some events, but my agenda literally exploded. Most of the praise goes to Terceiran people themselves, who enjoy what, to me, is an unseen degree of connectedness: they host you, they make phone calls for you, they pull strings. The level of friendliness was so high that at some stage I had to take a break. Additionally, this time I had a better knowledge of the transport network, and I began to use all means of transport very freely: this put me in touch, for example, with taxi drivers, most of which are eager to share their knowledge of the place. Eventually, I came back with plenty of material, some of which is reproduced in the *Appendixes*.

### 3.3.3. Data collection

Preliminary data gathering can be framed as a “rapid assessment,” which is a set of techniques Ellsberg and Heise illustrate in their *Handbook*.<sup>104</sup> According to Ellsberg and Heise, rapid assessments are popular because of their versatility and their ability to contribute to the design of interventions; therefore, they are deemed to be the first step of all ethnographic research.<sup>105</sup> On the down side, data gathering is limited and there is always the risk of transforming the appraisal into a ‘raid’ characterized by heavy extraction of information without the participation of targeted communities.<sup>106</sup>

However, I contend that rapid assessments are possibly the only way to study a concentrated event such as Terceira’s Carnival, which peaks on Mardi Gras and the three preceding days. Of course, Carnival is much more than that: it requires preparation, rehearsals, making costumes, choosing subjects, arranging timetables, calling friends, etc. In other words, cultural events such as Terceira’s Carnival, which monopolize an entire island, have blurred borders, which escape the official chronological demarcation of the feast. That is, Carnival as a process overextends itself and ends up touching different aspects of the life of the Island.

That is the reason why I contend a well-placed set of interviews carried out at a later time could help corroborate data gathered through participant observation during the celebrations.

In saying so, I appropriate Handwerker’s methodological remarks:

“Participant-observation consists of many kinds of data collection tools, each of which achieves specific ends [...]. Create multiple lines of evidence to assess the construct validity of your findings by using a variety of informants, different methods of data collection and analysis, and different questions bearing on the same issue. Use

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<sup>104</sup> Mary Carroll Ellsberg and Lori Heise, *Researching Violence Against Women: A Practical Guide for Researchers and Activists* (Washington (DC, USA): World Health Organization, PATH, 2005), 73–75, <https://www.who.int/reproductivehealth/publications/violence/9241546476/en/>.

<sup>105</sup> Ellsberg and Heise, 74.

<sup>106</sup> Ellsberg and Heise, 75.

informal conversations (which will range from chaotic to reasonably controlled interchanges) to create and build personal relationships. In the process, you will learn how informants feel, think about the world, make decisions, act, see new alternatives (or not), and identify and evaluate the pragmatic and moral dimensions of relationships, behavior, knowledge, feelings, and options. Informal interviews make ideal circumstances for asking informants to free-list components of specific cultural domains. This highly flexible interview format lends itself to highly personal one-on-one interviews, as well as it does to focus groups. It also yields the best data on the key social relations and social actors in a person's life. Observation makes it possible for you to evaluate what people claim that they and other people believe, feel, and do; to discover what they may know but take for granted; and to provide data for an independent evaluation of what people do or say they do [...]. Explicit apprenticeships allow quick cultural immersion. Identify life history events and processes that people find significant, as well as the nature of their significance. Collect documents, written by informants, elicited by you or not (e.g., letters), or assembled by governments or other organizations. Supplement these materials with person- or family-centered case studies, which make great stories that personalize and highlight key findings [...]. Use semi structured interviews, carried out face-to-face or in focus groups, to discern the range of variation in perceptions, feelings, and understandings about experiences of various kinds.”<sup>107</sup>

Although fieldwork operations were dominated by limitations in its accessibility, I strived to operate in an iterative way—at least as long as questions are concerned.<sup>108</sup> For example, if a casual informant would provide me with an answer to a question, I would use that answer to craft a question for my next informant.

As directed by Handwerker, informal interviews would establish a baseline of general information and foster my inclusion in the target culture.<sup>109</sup> To ease relationships I would “share [myself]” and make myself available to activities that pleased my informants but I would not have otherwise engaged in.<sup>110</sup> Most notably, in May 2022 I had to take a midnight plunge in Angra's bay despite the water being 16 °C—all because an informant had *really* insisted I joined her and her friends for the night.

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<sup>107</sup> Handwerker, *Quick Ethnography*, 80.

<sup>108</sup> Handwerker, 99–101.

<sup>109</sup> Handwerker, 105–107.

<sup>110</sup> See Handwerker, 107.

In the final text, field results are heavily integrated with historical and documentary research. Part of the documents I used come from ‘Biblioteca Pública e Arquivo Regional Luís da Silva Ribeiro’ and, in particular, its ‘Fundo Açores,’ which was made available to me for free. Other documents, and especially brochures and handwritten notes, were provided by my very informants.

### 3.3.4. *Quasi-ethnography: analysis and validation*

The present work, in its final textual form, constitutes what Mishler would call “imposing a *told* on the telling.”<sup>111</sup> As Kim puts it:

“We’ll have to reassemble or rearrange the *told* from interviews and other sources of data into chronologically or thematically coherent stories (depending on your research purpose), which is similar to Polkingorne’s narrative mode of analysis (narrative analysis). We have to reorder (reconstruct) a storyline from the telling(s).”<sup>112</sup>

Such action, although sympathetic with Handwerker’s idea of preliminary research,<sup>113</sup> takes us away from quantitative data curation and closer to what Guest et al. call the “top left quadrant” of “data analysis:” that is, qualitative analysis of qualitative data.<sup>114</sup> Guest et al. warn against missing on the “quantitative analysis” of “qualitative data;”<sup>115</sup> nonetheless, Terceira Island’s heritage is so imbued with already-existing narrative that, within the limited scope of the current research, a hermeneutic approach on ordering the *told* already saturates available resources for inquiry.

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<sup>111</sup> Elliot G. Mishler, ‘Models of Narrative Analysis: A Typology’, *Journal of Narrative and Life History* 5, no. 2 (1 January 1995): 87–123, <https://doi.org/10.1075/jnlh.5.2.01mod>.

<sup>112</sup> Jeong-Hee Kim, *Understanding Narrative Inquiry: The Crafting and Analysis of Stories as Research* (Thousand Oaks, California: Sage, 2016), <https://doi.org/10.4135/9781071802861>.

<sup>113</sup> Compare with Handwerker, *Quick Ethnography*.

<sup>114</sup> Greg Guest, Kathleen MacQueen, and Emily Namey, *Applied Thematic Analysis* (2455 Teller Road, Thousand Oaks California 91320 United States: SAGE Publications, Inc., 2012), <https://doi.org/10.4135/9781483384436>.

<sup>115</sup> Guest, MacQueen, and Namey.



That is not to say that data analysis will take the shape of a full Labovian reconstruction,<sup>116</sup> since, as Johnstone highlights, it relies on a Proppian approach to narratives.<sup>117</sup> One additional concern might be represented by the fact that reordering narratives and sources constitutes an act of hegemony by the researcher, which could shut down ‘native voices.’ However, as in Reed-Danahay’s summary of Motzafi-Haller’s position, a native voice might not be “necessarily more ‘authentic’ or ‘true’:” credit should still be given to the “positioning on the anthropologist.”<sup>118</sup>

Having accepted the value of anthropological constructions of a foreign culture, I still wanted to make native voices emerge and have them validate my results. Handwerker claims that “key informants are your teachers,” so I revised Hagberg and Körling’s investigative approach, which was in fact grounded on field inaccessibility:<sup>119</sup> most of their data collection had been accomplished thanks to the effort of “N’gna Taoré” and “Bintou Koné,” that is, “two Master students in Anthropology” who received appropriate funding from the project.<sup>120</sup> I was unable to recruit ‘my own’ students, but Sousa,<sup>121</sup> who was one of my key informant, had expressed the desire to work on Terceira’s heritage with my then-supervisor, Melotti, and some other Azorean colleagues. First arrangements were made as early as June 29, 2021, the day Sousa set up a discussion group on a messaging app, which he entitled “Carnival project.”

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<sup>116</sup> Kim, *Understanding Narrative Inquiry*, 201.

<sup>117</sup> Barbara Johnstone, ‘Discourse Analysis and Narrative’, in *The Handbook of Discourse Analysis*, ed. Deborah Schiffrin, Deborah Tannen, and Heidi E. Hamilton, 1st ed. (Wiley, 2005), 635–49, <https://doi.org/10.1002/9780470753460.ch33>.

<sup>118</sup> Deborah Reed-Danahay, ed., *Auto/Ethnography: Rewriting the Self and the Social*, 1st ed. (Routledge, 2021), 16.

<sup>119</sup> Hagberg and Körling, ‘Inaccessible Fields’.

<sup>120</sup> Hagberg and Körling, para. 24.

<sup>121</sup> For an example of Sousa’s work, see Francisco Sousa, ‘Is Action Research Necessarily Collaborative? Changing Mutuality within a Project’, *Educational Research and Evaluation* 22, no. 3–4 (18 May 2016): 234–50, <https://doi.org/10.1080/13803611.2016.1247723>.

At first, what was happening was not clear to me. Initially, owing to my prejudice, I feared this could be an open attempt to control the narrative, which could have resulted in what Finkelstein calls “lies, manipulations, and untruths.”<sup>122</sup> It is not that I thought my informant and his collaborators wanted to deceive me, but I expected some level of interference, partly comparable with what was experienced by Sundberg in Rwanda.<sup>123</sup> Notwithstanding this, I was ready to make the best of it, since, as Finkelstein maintains, “untruths” could constitute “critical archival material.”<sup>124</sup>

The result is what Murtagh defines a “critical quasi-ethnographic approach.”<sup>125</sup> Quasi-ethnography is described as a “study” in which the “timescale and frequency” does not match those of standard ethnographical research.<sup>126</sup> Namely, as Murtagh puts it:

“An ethnographic stance has been adopted in the sense that the study attempted to describe, understand, and search for meaning in the domain of formative assessment; ‘quasi’ given the timescale and frequency of visits to the settings involved and ‘critical’ given the extent to which there existed collaboration such that, in Lather’s terms, reflection and deeper understanding is achieved.”<sup>127</sup>

Brief, collaboration to the “Carnival project” with Azorean colleagues gave me the opportunity to achieve the following:

- Have natives review and validate the data I collected during my 2020 rapid assessment.
- Have natives cooperate in the construction of a scholarly narrative on a topic of Terceiran heritage of their choice.
- Interweave collected narratives with historical and documentary sources.
- Subject the work to the review of Azoreans that were not linked to Terceira Island.

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<sup>122</sup> Maura Finkelstein, *The Archive of Loss: Lively Ruination in Mill Land Mumbai* (Durham: Duke University Press, 2019), 26.

<sup>123</sup> Molly Sundberg, ‘Ethnographic Challenges Encountered in Rwanda’s Social Topography: The Researcher as Navigator’, *Anthropologie & Développement*, no. 40–41 (1 September 2014): 71–86, <https://doi.org/10.4000/anthropodev.300>.

<sup>124</sup> Finkelstein, *The Archive of Loss*, 26.

<sup>125</sup> Lisa Murtagh, ‘Implementing a Critically Quasi-Ethnographic Approach’, *The Qualitative Report* 12, no. 2 (2007): 193–215.

<sup>126</sup> Murtagh, 195.

<sup>127</sup> Murtagh, 197.

- Engage in an activity that achieved goals that mattered for the community.
- Contribute to the careers of my assistants.

Thus, what Francisco was offering to me, knowingly or not, was a shot at participatory data analysis and validation. Given the inaccessibility of the field for most of the course of my investigation, I could not have asked for a better opportunity. Moreover, as it soon became clear, my fears of manipulation were misplaced.

The first two points are self-explanatory. The outcome of the activity has been an academic article published on a journal chosen by the Azorean collaborators: the work is entitled “The Unknown Carnival of Terceira Island (Azores, Portugal): Community, Heritage, and Identity on Stage.”<sup>128</sup> The ‘unknown’ adjective is meant to highlight the desire, on behalf of informants, to have their Carnival recognized at an international level—possibly with a future inclusion in the UNESCO World Heritage List. Notwithstanding Crespo’s warning that heritagization could lead to a crystallization of native practices for the sake of third parties and at the expense of locals,<sup>129</sup> the impression I had during fieldwork is that most political life on Terceira Island revolves around securing footholds facing national and international authorities. Allegedly, this ensures the autonomy of the Azorean region.

Although all natives (and non-natives) I have met in Terceira Island appear to be very proud of Carnival as their cultural heritage, that is not the kind of “self-promotion” in which a

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<sup>128</sup> Andrea Mattia Marcelli et al., ‘The Unknown Carnival of Terceira Island (Azores, Portugal): Community, Heritage, and Identity on Stage’, *Sustainability* 14, no. 20 (14 October 2022): 13250, <https://doi.org/10.3390/su142013250>.

<sup>129</sup> Carolina Crespo, ‘Processes of Heritagization of Indigenous Cultural Manifestations: Lines of Debate, Analytic Axes, and Methodological Approaches’, in *Entangled Heritages: Postcolonial Perspectives on the Uses of the Past in Latin America*, ed. Olaf Kaltmeier and Mario Rufer, 1st ed. (New York, NY: Routledge, 2016.: Routledge, 2016), <https://doi.org/10.4324/9781315579849>.

native “[tells] tourists, writers, and filmmakers precisely what they want to hear.”<sup>130</sup> Instead, it is an expression of a post-anthropological society that attempts to place itself amidst what Ashworth and van der Aa call “the global rhetoric”,<sup>131</sup> which, according to Dippon and Moskaliuk, reflects the “increasing politicisation” of cultural heritage.<sup>132</sup>

As Sforzini highlights, “post-anthropology” is a Foucauldian concept.<sup>133</sup> The argument is as follows: in a modernist move, ‘man’ makes ‘himself’ the object of ‘scientific knowledge,’ thus becoming a true anthropological self; however, precisely because scientific knowledge is inherently reductionist, ‘man’ loses ‘himself.’<sup>134</sup> In strict Foucauldian terms, saying that Terceira Island is a post-anthropological society means that it looks elsewhere for a legitimization of its authenticity (namely, a supra-regional acknowledgment): “Man is no longer the realm of truth, the home of his own truth; his truth is told elsewhere.”<sup>135</sup> Conversely, in addition to this, my usage of the expression ‘post-anthropological society’ does also map on the concept of “post-ethnography” introduced by Goodall.<sup>136</sup> The involvement of native scholars proves that Terceira Island (and the Azores) are what Goodall

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<sup>130</sup> For this quote, see Clayton Robarchek and Carole Robarchek, ‘Trinkets and Beads. 1996. 52 Minutes, Color. A Video by Christopher Walker.’, *American Anthropologist* 100, no. 4 (7 January 2008): 1016.

<sup>131</sup> G Ashworth and Bart J. M. van der Aa, ‘Strategy and Policy for the World Heritage Convention: Goals, Practices and Future Solutions’, in *Managing World Heritage Sites*, ed. Anna Leask and Alan Fyall (Elsevier, 2006), 148, <https://doi.org/10.1016/B978-0-7506-6546-9.50021-6>.

<sup>132</sup> Peter Dippon and Johannes Moskaliuk, ‘Sharing Intangible Cultural Heritage: Disparities of Distribution’, *Journal of Heritage Tourism* 15, no. 4 (3 July 2020): 451, <https://doi.org/10.1080/1743873X.2019.1682003>.

<sup>133</sup> Arianna Sforzini, ‘Foucault and the History of Anthropology: Man, before the “Death of Man”’, *Theory, Culture & Society*, 16 November 2020, 026327642096355, <https://doi.org/10.1177/0263276420963553>.

<sup>134</sup> Compare with Sforzini, 10–16.

<sup>135</sup> Sforzini, 14.

<sup>136</sup> H. L. Goodall, ‘Turning within the Interpretive Turn: Radical Empiricism and a Case for Post-ethnography’, *Text and Performance Quarterly* 11, no. 2 (April 1991): 153–57, <https://doi.org/10.1080/10462939109366003>.

would describe as “not just a cultural site in which multiple voices vie for critical space and cultural definition; [but] also an ethnographic site of writing culture in a way that challenges the scholarly aims traditionally associated with ethnography.”<sup>137</sup>

Of course, Terceira Island is not the same as the Pennsylvania piece of land addressed by Goodall in his review. Nonetheless, it bears some striking similarities to it. To prove the point, I will rewrite Goodall’s description of the place by swapping ‘Pennsylvania’ with ‘Azores;’ my changes will be highlighted *in italics*:

“*The Azores, as every student of Portuguese history knows, were one of the earliest overseas settlements; Nemésio’s text critically locates within that mythic and well-worn metaphor of settlement the deeper seed of the radical incorporation of the Portuguese Empire, which itself becomes a metaphor for the institutional practice of ethnography. Nine islands of Portuguese settlement are thereby resown, rewritten, and, ultimately, renown. These are nine sites of cultural activity that portray various degrees of alienation from, participation in, and exploitation of the idea of incorporation. So, too, does Nemésio’s literary evocation of them. The result is a general rewriting of the Portuguese societal identity through ethnographic self-implication, and a serious reconsideration of how that system creates and constitutes the conditions for a purely fictional [lived experience] of Portugal.*”<sup>138</sup>

Here, I chose to swap the word “colonisation” with “settlement” to emphasize the fact Azores, as far as we know, were settled in the Fifteenth Century as outposts some time before the Portuguese colonial machine was fully set in motion.<sup>139</sup> Analogously, I chose Nemésio<sup>140</sup>

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<sup>137</sup> Goodall, 153.

<sup>138</sup> Compare with the original: “Pennsylvania, as every student of American history knows, was one of the original 13 colonies; Rose’s text critically locates within that mythic and well-worn metaphor of colonization the deeper seed of the radical *incorporation* of America, which itself becomes a metaphor for the institutional practice of ethnography. Four sites of American colonization are thereby resown, rewritten, and, ultimately, reknown. These are four sites of cultural activity that portray various degrees of alienation from, participation in, and exploitation of the idea of incorporation. So, too, does Rose’s ethnographic evocation of them. The result is a general rewriting of the American social class system through ethnographic self-implication, and a serious reconsideration of how that system creates and constitutes the conditions for a purely fictional [lived experience] of America.” Goodall, 155.

<sup>139</sup> See *Chapter 4* for insights on the history of the Azores Archipelago.

<sup>140</sup> Nemésio, ‘Açorianidade’.

instead of Rose<sup>141</sup> because, according to Leal, the former embodies a key character in the “invention of *açorianidade*”—that is, the intellectual concept of Azorean identity.<sup>142</sup>

If post-anthropology, post-ethnography, and scrambled investigative time frames call for a ‘quasi-ethnography,’ then I could as well see what type of anthropological knowledge on cultural heritage would emerge through the collaboration proposed by Sousa and, at the same time, use further data collection to validate it.

The result is a three-staged process, which unfolds at the following epistemological levels:

1. Early rapid assessment and documentary research (participant observation)
2. Participatory writing and production of a scholarly output (first-degree validation)
3. Later data collection and further validation through thematic analysis (non-structured interviews).

Although they have been made fully aware of their rights as per the European *RGPD 2016/679* and the Portuguese *Law 58/2019*, this specific reorganization of the research project in light of “what happened” (that is, ‘quasi-ethnography’) was not anticipated and was later developed after a retrospective reflection on how the project had evolved. The idea of retrospective analysis is backed by Lee and Gregory, who borrowed the idea from “psychotherapy process research.”<sup>143</sup>

### 3.3.5. *Sample and enshrinement*

As previously stated, fieldwork findings are further supplemented by validation on behalf of an expanded research team involving natives. This research has already been published with

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<sup>141</sup> Dan Rose, *Patterns of American Culture: Ethnography and Estrangement* (Philadelphia: University of Pennsylvania Press, 1989).

<sup>142</sup> João Leal, *Etnografias Portuguesas (1870-1970): Cultura Popular e Identidade Nacional* (Lisbon: Dom Quixote, 2000), 229–244.

<sup>143</sup> Bonnie K. Lee and David Gregory, ‘Not Alone in the Field: Distance Collaboration via the Internet in a Focused Ethnography’, *International Journal of Qualitative Methods* 7, no. 3 (September 2008): 30–46, <https://doi.org/10.1177/160940690800700303>.

explicit reference to the participation of native scholars and its sub-sample is illustrated in

*Table 4.*

<b>Name</b>	<b>Affiliation</b>	<b>Terceiran Culture expert?</b>
Andrea Mattia Marcelli	Unicusano	No (foreigner, Italian)
Francisco Sousa	CICS.NOVA.UAç	Yes (Terceira native)
Josélia Fonseca	University of Azores Centro de Educação de Adultos e Intervenção Comunitaria (CEAD), University of Algarve	Yes (Terceira native)
Leonor Sampaio da Silva	Centro de Humanidades (CHAM), Núcleo dos Açores, University of Azores/University Nova of Lisbon	Azorean culture expert (São Miguel native)
Marxiano Melotti	Centro de Humanidades (CHAM), Núcleo dos Açores, University of Azores/University Nova of Lisbon	No (foreigner, Italian)
Susana Goulart Costa	Centro de Humanidades (CHAM), Núcleo dos Açores, University of Azores/University Nova of Lisbon	Yes (Terceira native)

*Table 4: Scholarly research team composition.*

Earlier, I referred to these co-authors as ‘assistants.’ Since all of them are my senior in the academia, that is not entirely appropriate, but I chose to include the expression for compliance with Handwerker’s terminology: “assistants everywhere.”<sup>144</sup> Moreover, the concept of ‘assistant’ enables me to highlight a partial subversion of the usual power roles that Winlow et al. consider “inherent in the student–lecturer relationship.”<sup>145</sup> On the plus side, notwithstanding such subversion, I have always been treated as equal, and eventually the team insisted I be the corresponding author and first name of the article—following the typical Portuguese naming pattern (alphabetic order by personal names) but also enabling me to pilot and to experience the publication and review process first-hand. I specify such

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<sup>144</sup> Handwerker, *Quick Ethnography*, 253–260.

<sup>145</sup> Heather Winlow et al., ‘Using Focus Group Research to Support Teaching and Learning’, in *Pedagogic Research in Geography Higher Education*, ed. Martin Haigh, Debby Cotton, and Tim Hall, 1st ed. (Routledge, 2017).

editorial arrangements to show that decision-making was unbalanced in favour of native ‘assistants.’ I hope I have rewarded them with my hard work.

Following the first draft of the article, I began interviews with what Handwerker calls “cultural experts:” the importance of contacting “cultural experts” (of any kind) is pivotal to the obtainment of valuable in-depth information.<sup>146</sup> Given the inaccessibility of the field at several stages, it was not possible to go beyond the conversational level identified by Bianco in her handbook.<sup>147</sup> Rather than being merely preparatory, however, these conversations acquired a biographical penchant, in the style of the ethnographical works of Osella and Osella.<sup>148</sup> Eventually, their thematic analysis became a tool of validation for the narrative outlined in the scholarly article produced by the team. Participants to this stage of the research are outlined in *Table 5*.

<b>Type of informant</b>	<b>Number</b>
Folklore experts	4 (3M, 1F)
Music teacher	1 (1M)
Secondary school teachers	3 (2M, 1F)
Social worker	1 (1F)
Religious figures	2 (2M)
<b>Total</b>	11 (8M, 3F)

*Table 5: Informants sampled for conversations.*

While sampling techniques during exploratory fieldwork are too diverse to be accounted for—and identifying data from participants are not collected—conversations with ‘cultural experts’ reflected my investigative concern, that is, to reconstruct part of the educational ecosystem of Terceira Island in reference to its heritage, and Carnival in particular. I opted for snowballing as a sampling technique because of my reduced time frame. Nonetheless,

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<sup>146</sup> Handwerker, *Quick Ethnography*, 90–95.

<sup>147</sup> Bianco, *Dall’evento al documento: Orientamenti etnografici*, 163–164.

<sup>148</sup> See, e.g., Filippo Osella and Caroline Osella, *Social Mobility in Kerala: Modernity and Identity in Conflict*, Anthropology, Culture and Society (London (UK), Sterling (VA, USA): Pluto Press, 2000).



such system is still recommended by Handwerker and regarded to be one of the best ways to find ‘cultural experts’ and ‘assistants.’<sup>149</sup>

Convenience sampling has its own biases, which are extensively described by Emerson:

“A study that uses convenience sampling is somewhat caught between a single-subject approach (where a treatment or intervention is used with very few participants to focus on the efficacy of that treatment or intervention) and a randomized control group approach (where a sample of participants are randomly chosen from a large population and randomly assigned to treatment and control groups).”<sup>150</sup>

Convenience sampling bears some advantages, too: it is “affordable, easy, and the subjects are readily available.”<sup>151</sup> Also, “in some situations, the population may not be well defined [and] in other situations, there may not be great concern in drawing inferences from the sample to the population.”<sup>152</sup> However, notwithstanding the fact convenience samples almost always bias generalization, the greatest issue with them is that they just might not meet the benchmark of informativeness: in other words, a convenience sample might just not apply to the research problem.<sup>153</sup> Consequently, concerning *Table 5*, I opted for a “purposive sampling” of the type that Etikan et al. call “expert sampling,”<sup>154</sup> and which furtherly corresponds to Handwerker’s recommendations.

My purposive sampling follows the logic of what Olivier de Sardan calls “*enclichage*.”

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<sup>149</sup> Handwerker, *Quick Ethnography*.

<sup>150</sup> Emerson studies visual impairment and blindness, which falls completely out of my research focus; however, I found his summary to be very concise and compelling. See Robert Wall Emerson, ‘Convenience Sampling Revisited: Embracing Its Limitations Through Thoughtful Study Design’, *Journal of Visual Impairment & Blindness* 115, no. 1 (January 2021): 76, <https://doi.org/10.1177/0145482X20987707>.

<sup>151</sup> Ilker Etikan, Sulaiman Abubakar Musa, and Rukayya Sunusi Alkassim, ‘Comparison of Convenience Sampling and Purposive Sampling’, *American Journal of Theoretical and Applied Statistics* 5, no. 1 (2016): 2, <https://doi.org/10.11648/j.ajtas.20160501.11>.

<sup>152</sup> Etikan, Musa, and Alkassim, 1.

<sup>153</sup> Etikan, Musa, and Alkassim, ‘Comparison of Convenience Sampling and Purposive Sampling’.

<sup>154</sup> Etikan, Musa, and Alkassim, 3.

“The placement of the investigator in a society never happens with society as a whole, but through specific groups. She places herself in some networks instead of others. This bias is as redoubtable as inevitable. Often unwillingly but occasionally with her own complicity, the investigator can always be assimilated in a local ‘circle [*clique*]’ or ‘faction’—and this bears a double inconvenience. On the one hand, she risks turning herself too much into an echo of her adoptive ‘circle’ and to reiterate its points of view. On the other hand, she risks seeing the doors of other local ‘circles’ shutting around herself. This ‘enshrinement [*enclichage*],’ because of the anthropologist’s explicit choice, or because of her inadvertence, or because of a strategy pursued by the circle at hand, is surely one of the main issues of fieldwork inquiry. The fact itself that, in a given social space, local agents are widely re-connected with each other under the form of a network, makes the fieldwork anthropologist an inevitable tributary of such networks if she wants to produce her data. She becomes easily confined between them, in a way or another. Making use of an interpreter, who is always a ‘privileged informant,’ has introduced specific forms of ‘enshrinement:’ accordingly, the researcher depends on her affinities or conflicts with her interpreter, such as the affiliations or exclusions to which she is dragged into as the consequence of the latter’s standing.”<sup>155</sup>

By keeping this in mind, I elected to ‘ride’ the ‘enshrinement’ rather than dodge it. In fact, I have included it in my analytic framework both to keep it under check and to use it as an explanatory category. Accordingly, *Chapter 5* will identify, on the island, the existence of a “folk elites,” thusly defined: “all communities identify quality individuals depending on their contributions, and such individuals play a prominent role in the preservation, transmission, and re-invention of the cultural heritage.”<sup>156</sup>

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<sup>155</sup> Jean-Pierre Olivier de Sardan, ‘La Politique Du Terrain: Sur La Production Des Données En Anthropologie’, *Enquête*, no. 1 (1 October 1995): 20, <https://doi.org/10.4000/enquete.263>.

<sup>156</sup> Marcelli et al., ‘The Unknown Carnival of Terceira Island (Azores, Portugal)’, 14.

## 4. The field: globalizing Terceira

### 4.1. The Azores Autonomous Region

#### 4.1.1. Archipelago

The Azores Autonomous Region [*Região Autónoma dos Açores*] belongs to Portugal and encompasses an archipelago of nine islands in the North Atlantic Ocean, divided into three groups: the Eastern group, with São Miguel and Santa Maria; the Central Group, with Terceira, Pico, São Jorge, Faial, and Graciosa; the Western Group, with Flores and Corvo. They are scattered in an area with a latitude that ranges from 39.71° N to 36.98° N and a longitude that spans from 31.23° W to 25.10° W. Santa Maria, which is the closest to the nearest continental landmass, is 1,300 km away from the coasts of Portugal.<sup>1</sup> The land surface area of the archipelago is around 2,300 km<sup>2</sup>.<sup>2</sup> In landscape terms, the Azores are characterized by “a strong orography, where the high altitude is associated with the hardy relief.”<sup>3</sup> Owing to its location on the Terceira Rift, at the crossroads between the Mid-Atlantic Ridge and the Gloria Fault,<sup>4</sup> the archipelago is volcanically active and prone to earthquakes. This is a description by Corrêa, produced for his contribution to *Inovação cultural, patrimônio e educação*:<sup>5</sup>

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<sup>1</sup> Arthur Dahl, ‘Islands of Azores (Portugal)’, Island Directory, Islands Web (UNEP – United Nations Environment Programme, 2006), <http://islands.unep.ch/IDB.htm#903>.

<sup>2</sup> Pedro Pimentel et al., ‘Maritime Transportation Dynamics in the Azores Region: Analyzing the Period 1998–2019’, *Infrastructures* 7, no. 2 (30 January 2022): 4, <https://doi.org/10.3390/infrastructures7020021>.

<sup>3</sup> Pimentel et al., 5.

<sup>4</sup> Christian Hensen et al., ‘Marine Transform Faults and Fracture Zones: A Joint Perspective Integrating Seismicity, Fluid Flow and Life’, *Frontiers in Earth Science* 7 (19 March 2019): fig. 4, <https://doi.org/10.3389/feart.2019.00039>.

<sup>5</sup> Angel B. Espina Barrio, Antônio Motta, and Mário Hélio Gomes, eds., *Inovação cultural, patrimônio e educação* (Recife, PE: Fundação Joaquim Nabuco, Editora Massangana, 2010).

“The Azores archipelago is an ensemble of nine islands between the European and the American continent, that is, nine volcanic peaks located at the centre of the Atlantic Ocean, some 2000 km from Continental Portugal. It was discovered for the first time in 1431 and settled during the following centuries, mostly because of its strategic importance for transoceanic sailing routes and for the expansion of Portuguese territory. It used to be the headquarters of the Admiralty [*Provedoria das Armadas*] [...]. Because of its character of crossroads between the New and the Old World, it was reached by vessels from all over the globe, with new plants and spices, and, additionally, it served as a hub where exotic plant species were tried before being introduced to Europe.”<sup>6</sup>

The Azores Autonomous Region was created in 1976 and is regarded by Amaral as the first authentic experience of autonomous popular government of the region, which used to be administered “in a very centralized fashion” through the royal appointment of governors.<sup>7</sup>

As such, the Azores are currently ranked among the “most remote regions” of the European Union: they are not considered overseas territories<sup>8</sup> but “Outermost Regions,” or simply “ORs”—which are identified through “Articles 349 and 355 the Treaty on the Functioning of the European Union (TFEU).”<sup>9</sup> This means that they do not act as external polities that are “constitutionally linked” to a member State of the European Union; instead, they are *part* of such State and, as such, they belong to the “single market.”<sup>10</sup>

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<sup>6</sup> Corrêa, ‘Certificação de produtos tradicionais, educação e inovação de um patrimônio regional: o caso do “Bolo Lêvedo dos Açores”’, 149.

<sup>7</sup> João Bosco Mota Amaral, ‘Development of the Azores: Problems and Prospects’, *Ekistics* 54, no. 323/324 (June 1987): 143.

<sup>8</sup> Stefano Moncada et al., ‘Islands at the Periphery: Integrating the Challenges of Island Sustainability into European Policy’, in *Malta in the European Union: Five Years on and Looking to the Future*, ed. Peter G. Xuereb (Msida, Malta: European Documentation and Research Centre, University of Malta, 2009), 56.

<sup>9</sup> Marek Kołodziejcki, ‘Outermost Regions (ORs)’, Fact Sheets on the European Union (European Parliament, March 2022), <https://www.europarl.europa.eu/factsheets/en/sheet/100/outermost-regions-ors->

<sup>10</sup> Kołodziejcki.

#### 4.1.2. Demographics

According to the 2021 census, the Azores Autonomous Region hosts 236,440 residents.<sup>11</sup> In 2020, the figure was 242,201,<sup>12</sup> and in 2019 it was 242,796.<sup>13</sup> The age composition of the population is as follows: 14.6% aged 14 years old or below; 11.9% aged between 15 and 24; 56.9% aged between 25 and 64; 16.5% aged above 65.<sup>14</sup> The ratio of residents under 14 is lower than the European average of 15.1% for the same year of reference (2021);<sup>15</sup> however, the difference with the European datum is of less than 0.5%. A more striking datum concerns people aged 65 or above: whereas Europe has a 20.8% share of elderly people,<sup>16</sup> the Azores Autonomous Region's figure is 4.26% lower (16.5%). This is in stark contrast with Portugal, which saw a 20.6% increase in the number of elders in the 2011–2021 decade.<sup>17</sup> With a resulting 23.43% share of residents aged 65 or above, this is well above the average European values. One of the mitigating factors in this sense appears to be life expectancy, Azores having the lowest figure in the country.<sup>18</sup>

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<sup>11</sup> SREA, 'Censos 2021: Principais Resultados Provisórios', Informação estatística (SREA – Serviço Regional de Estatística dos Açores, 16 December 2021), <https://srea.azores.gov.pt/Conteudos/Media/file.aspx?ida=10617>.

<sup>12</sup> INE, 'População residente (N.º) por Local de residência (NUTS - 2013), Sexo e Grupo etário; Anual', Base de Dados (Lisboa: INE – Instituto Nacional de Estatística, 14 June 2021),

[https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine\\_indicadores&contacto=pi&indOcorCod=0008273&selTab=tab0](https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_indicadores&contacto=pi&indOcorCod=0008273&selTab=tab0).

<sup>13</sup> Kołodziejcki, 'Outermost Regions (ORs)'.

<sup>14</sup> SREA, 'Censos 2021: Principais Resultados Provisórios'.

<sup>15</sup> Eurostat, 'Population Structure and Ageing', Statistics report, Statistics-Explained (Eurostat, February 2022).

<sup>16</sup> Eurostat.

<sup>17</sup> INE, 'Censos 2021: Contámos com todos – resultados provisórios'.

<sup>18</sup> INE, 'Região Norte manteve a esperança de vida mais elevada à nascença e área metropolitana de Lisboa manteve a esperança de vida mais elevada aos 65 anos', Informação estatística, Destaque (Lisboa: INE – Instituto Nacional de Estatística, 24 September 2021), [https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine\\_destaques&DESTAQUESdest\\_boui=415515681&DESTAQUESmodo=2&xlang=pt](https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_destaques&DESTAQUESdest_boui=415515681&DESTAQUESmodo=2&xlang=pt).

#### 4.1.3. Springboard to Ultramar

Together with Madeira (1419), Azores (circa 1440)<sup>19</sup> are among the first Atlantic islands settled by the Portuguese. Early Azorean economy focused on the production of cereals and wine,<sup>20</sup> owing to the great fertility of the islands' soil—with yields in Terceira reaching 1:10–12.<sup>21</sup> In the Fifteenth Century, the Portuguese crown would issue favours to aristocrats in exchange their commitment to settle certain regions.<sup>22</sup> Azores were no exception and they enjoyed a population spike between 1500 and 1550.<sup>23</sup> In 1570, after the depletion of soil owing to intensive agriculture, a rotation system was introduced, as well as more livestock, which resulted in another productivity spike—to the point that, circa 1600, the Azores compensated for the shortcomings of mainland Portugal's food production.<sup>24</sup>

Since their early settlement, the Azores played a strategic role in Portuguese overseas [*Ultramar*] expansion. Given their relatively central position in North Atlantic Azores became the springboard of Portuguese colonization efforts. Matos and Sousa describe the phenomenon with these words: “the archipelago continued to be a sort of intermediate area between colonial spaces and the metropolitan kingdom until 1834, when the Azores formally became a new province of European Portugal.”<sup>25</sup>

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<sup>19</sup> Anthony John R. Russell-Wood, ‘Padrões de Colonização no Império Português, 1400-1800’, in *A expansão marítima portuguesa, 1400-1800*, trans. Miguel Mata, Portuguese translation, Lugar da história (Lisboa: Edições 70, 2010), 188.

<sup>20</sup> Stuart B Schwartz, ‘A Economia do Império Português’, in *A expansão marítima portuguesa, 1400-1800*, trans. Miguel Mata, Portuguese translation, Lugar da história (Lisboa: Edições 70, 2010), 25.

<sup>21</sup> Leonor Freire Costa, Pedro Lains, and Susana Münch Miranda, *An Economic History of Portugal, 1143-2010* (Cambridge, United Kingdom: Cambridge University Press, 2016), 68.

<sup>22</sup> Russell-Wood, ‘Padrões de Colonização no Império Português, 1400-1800’, 183.

<sup>23</sup> Russell-Wood, 186.

<sup>24</sup> Costa, Lains, and Miranda, *An Economic History of Portugal, 1143-2010*, 87.

<sup>25</sup> Paulo Teodoro de Matos and Paulo Silveira e Sousa, ‘Settlers for the Empire: The Demography of the Azores Islands (1766–1835)’, *Anais de História de Além-Mar* 16 (2015): 19.

Other than enjoying a strategically convenient position, Azores experienced low mortality and population surplus, which motivated the Portuguese governments of different ages to entice Azoreans into settling its other overseas colonies.<sup>26</sup> Campaigns for mass migration to Brazil were launched by the Portuguese crown in 1747–1748, in 1750s, and in 1760s.<sup>27</sup> Additionally, Azores were a place for the recruiting of military personnel, which is testified by the reduction in growth of the populations of São Miguel and Terceira between 1776 and 1796.<sup>28</sup>

A result of the above has been the creation of vibrant expat communities. Concerning this, Corrêa says:

“Throughout its history, [the Autonomous Region] kept being a source of settlers, which continued to expand [Portuguese] territory across and beyond the Atlantic—eventually generating what many call ‘the Azorean Diaspora,’ which is scattered over the world as communities cradled by other communities, with a continuous flow of people, information, and culture.”<sup>29</sup>

#### 4.1.4. Azorean Identity

The most popular reflection on Azorean identity [*Açorianidade*] is that of Nemésio’s homonymous article.<sup>30</sup> Leal draws on that seminal contribution to address another work by Nemésio, *Le Mythe de Monsieur Queimado*,<sup>31</sup> which explores the same theme through a literary ploy.<sup>32</sup> There, Nemésio writes of a (fictitious) encounter with Mr Queimado on board of a ferry. Queimado is described as a young and naïve man who pursues naturalistic

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<sup>26</sup> Matos and Sousa, 20, 31.

<sup>27</sup> Matos and Sousa, 36.

<sup>28</sup> Matos and Sousa, 27.

<sup>29</sup> Corrêa, ‘Certificação de produtos tradicionais, educação e inovação de um patrimônio regional: o caso do “Bolo Lêvedo dos Açores”’, 149–150.

<sup>30</sup> Nemésio, ‘Açorianidade’.

<sup>31</sup> Vitorino Nemésio, *Le mythe de monsieur Queimado* (Lisboa: Institut Français au Portugal, 1940), <https://purl.pt/30433>.

<sup>32</sup> João Leal, ‘Açorianidade: Literatura, Política, Etnografia (1880-1940)’, *Etnográfica* 1, no. 2 (1997): 191–211, <https://doi.org/10.4000/etnografica.4381>.

endeavours but is, in fact, obsessed by the myth of a fundamental structure that is shared by all Azorean people: as if Atlantis was a submerged continent and Macaronesia its extant land, with no historical or evolutionary ties with the rest of the world.<sup>33</sup>

As observed by Leal, the quest for “provincial identities” is a recurrent theme in the 1880–1940 period and could be better understood through the lenses of opposing categories: that of unity and of difference.<sup>34</sup> Namely, unity is postulated with reference to a distant or submerged past, which escapes the falsificationist efforts of current science; conversely, difference is predicated in contrast with other “unities,” and, in particular, the national ones, which are often seen as monolithic wholes.<sup>35</sup>

Moreover, Leal remarks that a further point of convergence between all authors concerned by *Açorianidade* is not conceptual, but methodological: they all attempt to collect auto-ethnographical statements—that is, “sets of assertions that enjoy a strong ethno-cultural orientation.”<sup>36</sup> According to Leal, this “spontaneous ethnography” could be understood through the framework offered by Smith, who sees it as the co-construction of a genealogy (or pedigree) characterized by homogeneous habits, customs, and peculiarities that are not shared by other surrounding communities.<sup>37</sup> Possibly, this is equivalent to the construction of a “collective individual.”<sup>38</sup>

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<sup>33</sup> Leal, 191–192.

<sup>34</sup> Leal, 192.

<sup>35</sup> Leal, 192–193.

<sup>36</sup> Leal, 193.

<sup>37</sup> Anthony D. Smith, *National Identity* (Hardsmontworth: Penguin, 1991).

<sup>38</sup> Leal, ‘Açorianidade: Literatura, Política, Etnografia (1880-1940)’; Concept taken from Louis Dumont, ‘Une variante nationale: La nation chez Herder et Fichte’, in *Essais sur l’Individualisme: Une Perspective Anthropologique sur l’Idéologie Moderne*, ed. Louis Dumont (Paris: Seuil, 1983), 115–31.



A seminal contribution was that of Furtado,<sup>39</sup> but Leal illustrates that such anthropological effort is too intertwined with naïve Darwinism and ends up regarding the Azorean peoples as equivalent to Galápagos finches—different strains, all of them geographically isolated.<sup>40</sup>

Since the 1890s, naturalistic studies were substituted by political demands: it was the dawn of the Azorean separatist movement.<sup>41</sup> The political scene aimed at the constitution of Azores as an autonomous country, yet identity was postulated as a consequence of diversity: differently from Portugal—political writers claimed—Azores were a melting pot of various people (early Flemish and Breton settlers) and, as such, deserved special consideration in face of continental authorities.<sup>42</sup>

Notably, although independentist movements peaked during the post-World War I political crisis (1920s), their headquarters remained on São Miguel Island, and their ideologies were hardly exported to the intellectual circles of other islands.<sup>43</sup> Such opposition is epitomized by Ribeiro's (1882–1955)<sup>44</sup> political contribution: the anthropologist, who founded the *Instituto Histórico da Ilha Terceira* and of the *Museu de Angra do Heroísmo*, spoke in 1919 of Azores *as part* of Portugal and denounced attempts to frame their independence under the supposedly benevolent eye of the American superpower.<sup>45</sup> However, the category of difference reappears: according to Ribeiro, Azoreans represent a sub-set of the Portuguese

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<sup>39</sup> Francisco de Arruda Furtado, *Materiais para o estudo antropológico dos povos açorianos: observações sobre o povo Micaelense* (Ponta Delgada: Tipografia Popular, 1884).

<sup>40</sup> Leal, 'Açorianidade: Literatura, Política, Etnografia (1880-1940)', 194–196.

<sup>41</sup> Leal, 196.

<sup>42</sup> Leal, 197.

<sup>43</sup> Leal, 198.

<sup>44</sup> Luís da Silva Ribeiro, 'Os Açores de Portugal', in *Obras Vol II: História* (Angra do Heroísmo: Instituto Histórico da Ilha Terceira, Secretaria Regional da Educação e Cultura, 1983), 1–17.

<sup>45</sup> Leal, 'Açorianidade: Literatura, Política, Etnografia (1880-1940)', 198–199.

people, but somewhat “pure,” and untouched by the greed of imperialism.<sup>46</sup> By saying so, Ribeiro was promoting a cultural version of the evolutionary argument by Furtado.<sup>47</sup>

Such theme is revived by Nemésio, who struggles with the singularity of Azorean characters: the hard-working Micaelense, the bizarre Terceirense, and the honest Picaroto; that is, folk psychological traits superimposed upon a geographical datum.<sup>48</sup> This echoes Ribeiro, who would later (1936) try to underline two geographical-psychological connections:<sup>49</sup> between volcanism, uncertainty, and the religiousness of the Azoreans; and between humidity and the so-called “Azorean listlessness [*torpor açoriano*].”<sup>50</sup>

At the level of conceptual discontinuity, both authors—Ribeiro and Nemésio—are exercising their hermeneutic creativity to come up with a renewed representation of the Azoreans. Conversely, at the level of conceptual continuity, aside historical references in the content of their writings, both are reworking the popular notion of *saudade*, but with an Azorean twist.<sup>51</sup> According to the authors, empirical evidence for such claims is given by the emotional shade of Azorean literature and theatre: tragedy, on the one hand, and satirical shenanigans on the other—the latter, understood more as a by-product of insufferable sadness than as expression of genuine joy and excitement. As a result, for Leal, it is as if Nemésio and Ribeiro tried to sketch the mesological (i.e., ecological) foundations of Azorean cultural expressions: their effort is both grounded on historical materialism (living conditions have shaped ways of thinking) and on a spiritualistic interpretation of nature and its effects on the human soul.

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<sup>46</sup> Ribeiro, ‘Os Açores de Portugal’, 4.

<sup>47</sup> Leal, ‘Açorianidade: Literatura, Política, Etnografia (1880-1940)’, 200–202.

<sup>48</sup> Leal, 203–204.

<sup>49</sup> Luís da Silva Ribeiro, ‘Subsídios para um Ensaio sobre a Açorianidade’, in *Obras Vol II: História* (Angra do Heroísmo: Instituto Histórico da Ilha Terceira, Secretaria Regional da Educação e Cultura, 1983), 515–56.

<sup>50</sup> Leal, ‘Açorianidade: Literatura, Política, Etnografia (1880-1940)’, 205.

<sup>51</sup> Leal, 205–206.

However, neither appear to move beyond a simplified form of determinism *à la* Émile Zola: character as a consequence of the stock (race), the environmental context, and opportunities.<sup>52</sup> A commentary to such interpretation of Azorean identity could be that of Pessoa's *Livro do Desassossego*: since human beings are but animals among the many, all cults and ideologies that celebrate mankind (or part thereof) are just another type of animal cults.<sup>53</sup>

#### 4.1.5. *Islands of love?*

During interviews, no informant mentioned 'love.' Therefore, I elected this to be a provocative introduction to Terceira's identarian problem: it showcases the efforts of a travel company that is heavily involved in tourism to transform the island into a commodified product that appeals to certain potential customer groups.

Hence, on my third journey to the island, I came across the idea of the 'island of love' on board of a flight operated by Serviço Açoriano de Transportes Aéreos (also known as Air Azores, or SATA). In fact, the lunch served by the cabin crew came in a nice rectangular food box [*caixa de refeição*] that featured an aerial view of Angra do Heroísmo (a picture possibly taken from Cruzeiro Serra do Morião) and an intriguing statement in English: "In Terceira Island lies a Unique story of love and jealousy." Portuguese translation was conveniently provided below the main picture, in small print. In the inside, I found another statement in two languages:

"And not even the jealousy of the almighty lord of the seas managed to separate the lovers, entwined, until today, before everyone's eyes: the prince transformed into Monte Brasil and the princess, next to him, in the form of the beautiful city of Angra

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<sup>52</sup> Hippolyte-Adolphe Taine, *Histoire de La Littérature Anglaise, Tome Premier* (Paris: Hachette, 1866), xxiii, <https://gallica.bnf.fr/ark:/12148/bpt6k201421z.image#>.

<sup>53</sup> Fernando Pessoa, *Livro Do Desassossego Por Bernardo Soares* (Lisboa: Ática, 1982).

do Heroísmo (Legend of Angra do Heroísmo, a UNESCO World Heritage Site, Terceira Island).”<sup>54</sup>

After reading that, a QR code led me to the SATA blog, which contained the legend of two lovers ousted and cursed by the Lord of the Seas, who eventually transformed them into Monte Brasil and Angra do Heroísmo.<sup>55</sup>

Although motivated by the tourism industry, this tale is told in an almost identical way to children. In fact, a similar version was included in *Lendas da Ilha Terceira*, which is a book of tales about the island collected and rewritten in 2009 (?) by the Grade 4 students of Escola Básica e Secundária Tomás de Borba.<sup>56</sup> The story is retold by Inês Antunes who is possibly also the author of the drawing that represents the main characters (a prince and a princess) lying underneath the landscape of Angra and Monte Brasil.<sup>57</sup>

Once I landed on the island, the little episode of the lunch box struck me as a clue to the Terceiran people’s volatile attitude towards the economic value of heritage. As highlighted by the inclusion of the ‘love’ legend in children’s education, heritage is valued both as an object of enjoyment and a learning opportunity. If anything, this local ‘etiogeological’ story clashes with what Amália Rodrigues used to sing about Azorean mating:

“The girls of Terceira  
Did not like even São Miguel  
Vanity is a bad counsellor  
None of them found a boyfriend there  
  
The girls of Terceira  
Get married in the Continent  
Here is the joke:

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<sup>54</sup> Serviço Açoriano de Transportes Aéreos, ‘SATA 2022 food box’, May 2022, Col. Andrea Mattia Marcelli.

<sup>55</sup> Azores Airlines, ‘Na ilha Terceira, uma história única de amor e ciúme’, *Azores Airlines Blog* (blog), 13 December 2021, <https://azoresairlinesblog.com/2021/12/13/lenda-de-angrado-heroismo-ilha-terceira/>.

<sup>56</sup> Alunos do 4.º ano da EBS Tomás de Borba, *Lendas da Ilha Terceira* (Angra do Heroísmo (PT): EBS Tomás de Borba, 2009), [https://issuu.com/sppr20/docs/lendas\\_da\\_ilha\\_terceira2](https://issuu.com/sppr20/docs/lendas_da_ilha_terceira2).

<sup>57</sup> Alunos do 4.º ano da EBS Tomás de Borba, 4.

We do not look like human beings  
 The girls of Terceira  
 According to a silly song  
 Are juicy oranges  
 One should taste them  
 If only it wasn't for their bad attitude  
 Sour and jealous  
 You don't even see joy  
 In these bread-buns lacking salt  
 Who went to Santa Maria  
 And have been to Fajal  
 In Terceira, flees  
 Whoever is looking for a beautiful girl  
 It is much better to wed  
 In São Jorge or Graciosa  
 [...]  
 In Terceira, the Chamarrita<sup>58</sup>  
 Never gave a girlfriend to anyone  
 The pretty dancing girls  
 Do not want to be so cheeky  
 Terceira leads the rich one  
 To a rich bride of the Azores  
 [Instead,] the poor one chooses Pico  
 To wed, or Corvo, or Flores.”<sup>59</sup>

#### 4.1.6. *The pitfalls of commodifying narratives*

Commodifying attempts bear mixed results and SATA itself stands the case since it is subject to jokes and criticism. References to SATA feature regularly in the yearly Carnival shows [*bailinhos*];<sup>60</sup> moreover, the company can boast its own social media page of haters, under the

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<sup>58</sup> Azorean typical dance. See Sophie Coquelin, ‘Um Baile Da Açorianidade? Patrimonialisation Ordinaire Du Bal de Chamarritas Sur l’île de Pico (Açores, Portugal)’, *Norois*, no. 256 (20 December 2020): 43–57, <https://doi.org/10.4000/norois.10174>.

<sup>59</sup> Amália Rodrigues, *As Meninas Da Terceira*, Vinyl, LP, Album, Club Edition, Reissue, Oiça Lá Senhor Vinho (Orlador, 1976), <https://www.discogs.com/release/5693787-Am%C3%A1lia-Rodrigues-Oi%C3%A7a-L%C3%A1-Senhor-Vinho>.

<sup>60</sup> Luiz Fagundes Duarte, ‘O Carnaval na ilha Terceira’, *Comunicação & Cultura*, 1 June 2010, 90, <https://doi.org/10.34632/COMUNICACAOECULTURA.2010.546>.

neutral guise of a non-contentious name: “Azores Airlines / SATA Airlines Stories & Reviews.”<sup>61</sup>

Upon entering the social media group, most of whose posts are public, the user is confronted with two ridiculing pictures. One is a photograph of a banner hung by *Juventude Popular* (the youth organization of Portuguese Centre Democrats),<sup>62</sup> which displays a wordplay based on the company’s acronym: “We have planes only tomorrow [*Só Amanhã Temos Aviões*]”<sup>63</sup>— meaning there are no flight available today. The backronym, which reflects a false etymology produced for humoristic purposes already circulated on the same social network during the 2014 pilots’ strike,<sup>64</sup> meaning that it spread before the creation of the review group, which dates 2018.<sup>65</sup> The other picture, which is the profile picture of the group, shows a skeleton wearing a woman’s dress sitting on a bench with a suitcase at her side; the caption reads: “Waiting... for SATA.”<sup>66</sup>

The group links to [www.satasucks.com](http://www.satasucks.com), which is not a real website (as of August 2022, it returned a 404 error). Despite the contentious profile images, review of two years of admin posts featured on the page (May 5, 2020–May 5, 2022) revealed only links to articles concerning SATA, with no specific comments on behalf of the page managers. The first post

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<sup>61</sup> Satasucks, ‘Azores Airlines / SATA Airlines Stories & Reviews’, *Facebook*, 2018, <https://www.facebook.com/AzoresAirlineStories/about>.

<sup>62</sup> Juventude Popular, ‘Juventude Popular’, accessed 30 May 2022, <https://www.juventudepopular.pt/>.

<sup>63</sup> Satasucks, ‘Só amanhã temos aviões’, *Facebook*, 11 July 2022, [https://www.facebook.com/photo/?fbid=703804167393011&set=a.703804134059681&\\_\\_tn\\_\\_=%2CO\\*F](https://www.facebook.com/photo/?fbid=703804167393011&set=a.703804134059681&__tn__=%2CO*F).

<sup>64</sup> For example, in Darold Coelho, ‘SATA ... means ...’, *Facebook*, 21 June 2014, [https://www.facebook.com/1631345563758111/photos/a.1631349020424432/1631348940424440/?comment\\_id=1633796720179662&\\_\\_tn\\_\\_=R\\*F](https://www.facebook.com/1631345563758111/photos/a.1631349020424432/1631348940424440/?comment_id=1633796720179662&__tn__=R*F).

<sup>65</sup> Satasucks, ‘Azores Airlines / SATA Airlines Stories & Reviews’.

<sup>66</sup> Satasucks, ‘Waiting... for SATA’, *Facebook*, 11 July 2022, [https://www.facebook.com/photo/?fbid=703804170726344&set=a.703804130726348&\\_\\_tn\\_\\_=%2CO\\*F](https://www.facebook.com/photo/?fbid=703804170726344&set=a.703804130726348&__tn__=%2CO*F).

of the page draws on a newspaper article describing the delays that plagued the company up until August 30, 2018: “the third worst [...] of 153 airway carriers in terms of punctuality, occupying the discrediting 151<sup>st</sup> spot on the ranking.”<sup>67</sup>

Nowadays, SATA is different. The acronym is used for the managing group (SATA Group), and the international branch of the company was rebranded Azores Airlines in 2015, following a massive restructuring. Personally speaking, I encountered no issues flying with this carrier. The point of this paragraph is not a criticism of SATA *per se* but offering an example on the contradictions of collective memory and the usage of heritage for commodifying purposes.

On the one hand, the airline company, owing to contemporary marketing strategies, brands the island to commodify it: “the island of love.” On the other hand, however, that same company is attempting to detach itself from the stereotype it represents in collective memories—and it is a complicated effort. For example, during my last visit to Terceira Island (May 2022), a fellow tourist pointed at a woman jogging near Angra’s Farol with her pet dog. My friend uttered: “She called her dog like the carrier!” I paid attention and could hear the old lady saying: “Sata! Sata!” And the dog would follow her.

Criticism of public (or formerly public) companies in social media is a historically consolidated<sup>68</sup> and ubiquitous practice.<sup>69</sup> Aside of the reputations of the firms, these

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<sup>67</sup> Satasucks, ‘Há uns dias atrás a Juventude Popular (JP)...’, *Facebook*, 30 August 2018, [https://www.facebook.com/AzoresAirlineStories/posts/pfbid0rFzzBSCwVinZwwY5RBcMC SwJt1Mrs4GbUzxG4E3wNB6uiTFWGKW39ywcsnwkFMB1?\\_\\_cft\\_\\_\[0\]=AZW053a29hoYq AKPZbDuO0HjLL\\_lapnbUwPP1a6MH9sLCb36bkYaSzvvtDIBs6ZfRtTGNSF9CGNQQmly 24b-HG0g2KJwteSeFSu2W3ovIaLP1LV9wsU\\_souc\\_ZPZ6lmu6UPj9YDQL-mriNf4jp578QVXfDIEI0k0sl4IPpkGtLSKqS6u2FS1ej3\\_saeFqt7d4Q&\\_\\_tn\\_\\_=%2CO%2CP -R](https://www.facebook.com/AzoresAirlineStories/posts/pfbid0rFzzBSCwVinZwwY5RBcMC SwJt1Mrs4GbUzxG4E3wNB6uiTFWGKW39ywcsnwkFMB1?__cft__[0]=AZW053a29hoYq AKPZbDuO0HjLL_lapnbUwPP1a6MH9sLCb36bkYaSzvvtDIBs6ZfRtTGNSF9CGNQQmly 24b-HG0g2KJwteSeFSu2W3ovIaLP1LV9wsU_souc_ZPZ6lmu6UPj9YDQL-mriNf4jp578QVXfDIEI0k0sl4IPpkGtLSKqS6u2FS1ej3_saeFqt7d4Q&__tn__=%2CO%2CP -R).

<sup>68</sup> Lan Xia, ‘Effects of Companies’ Responses to Consumer Criticism in Social Media’, *International Journal of Electronic Commerce* 17, no. 4 (2013): 73–99.

anecdotes draw the attention on what is understood to be an inherent cause of vulnerability for peripheral territories: regional and ultra-regional integration through transportation.<sup>70</sup> The appreciation of such phenomenon calls into question the notion of *peripherality*, which is a distinguishing character of Small Island States but also of the outermost small island regions of Europe—such as the Azores.<sup>71</sup>

## 4.2. Small islands: challenges and resources

### 4.2.1. Peripherality and island vulnerability

According to Weaver, peripherality could be understood as both a source of vulnerability and of opportunity: on the one hand, he appreciates that core-periphery models enjoy the first epistemological place in the ranking of explanation to island-related phenomena; however, on the other hand, he wonders whether over-reliance on the core–periphery dyad has the effect of obscuring other dynamics at play.<sup>72</sup>

For example, one of the issues<sup>73</sup> analysed by Weaver maintains that small islands can become tourist centres *because* of the fact they are peripheral but, at the same time, their touristic

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<sup>69</sup> Sara Orthaber, ‘Aggressive Humour as a Means of Voicing Customer Dissatisfaction and Creating In-Group Identity’, *Journal of Pragmatics* 152 (October 2019): 160–71, <https://doi.org/10.1016/j.pragma.2018.11.002>.

<sup>70</sup> Pimentel et al., ‘Maritime Transportation Dynamics in the Azores Region’.

<sup>71</sup> Pimentel et al.; Kołodziejcki, ‘Outermost Regions (ORs)’.

<sup>72</sup> David Bruce Weaver, ‘Core–Periphery Relationships and the Sustainability Paradox of Small Island Tourism’, *Tourism Recreation Research* 42, no. 1 (2 January 2017): 13, <https://doi.org/10.1080/02508281.2016.1228559>.

<sup>73</sup> I concur with Butler when he claims that the issues addressed by Weaver are not actual contradictions. See R. W. Butler, ‘Thoughts on Core–Periphery and Small Island Tourism’, *Tourism Recreation Research* 42, no. 4 (2 October 2017): 538, <https://doi.org/10.1080/02508281.2017.1359958>.



appeal relies on low prices, which result from the drawbacks of their very peripheral condition.<sup>74</sup> In sum, the conundrums he raises are the following:

- “Small islands are geographical peripheries but experiential *cores*.”<sup>75</sup>
- “They tend to foster economic marginality but also develop as *tourism centres*.”<sup>76</sup>
- They are “sites of tourism monocultures but within contexts of *eclectic economic innovation*.”<sup>77</sup>
- They are geopolitically dependent but could enjoy *selective autonomy*.<sup>78</sup>
- “Tourism homogeneity *but* cultural and ecological distinctiveness.”<sup>79</sup>

In response to Weaver, Butler criticizes one of his main assumptions: just because there is at least one positive horn for each conundrum, it does not follow that sustainable practices are achievable in a heavy touristic setting.<sup>80</sup> Moreover, Butler solves other conundrums:

- That small islands could be experiential *cores* is not controversial but typical.
- That economic marginality and tourism centrality coexist is just a mirror of the undiversified nature of islands’ economies.

Eventually, he accepts only the fourth conundrum as a potentially original paradox: islands are geopolitical subservient to world titans but, in everyday matters, they rely on their own devices.<sup>81</sup> Additionally, Butler does not believe—as Weaver does—that the contradictions of small island tourism could be solved by attaining ecological sustainability *through* tourism.<sup>82</sup> This latter point deserves explanation. In his paper, Weaver maintains that tourism is primarily a homogenising force, which runs the risk of ‘flattening’ landscapes both in cultural and ecological terms; however, at the same time, tourist destinations should be able to display

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<sup>74</sup> Weaver, ‘Core–Periphery Relationships and the Sustainability Paradox of Small Island Tourism’, 13.

<sup>75</sup> Weaver, 13–14.

<sup>76</sup> Weaver, 14–16.

<sup>77</sup> Weaver, 16–17.

<sup>78</sup> Weaver, 17–18.

<sup>79</sup> Weaver, 18–19.

<sup>80</sup> Butler, ‘Thoughts on Core–Periphery and Small Island Tourism’, 537.

<sup>81</sup> Butler, 539.

<sup>82</sup> Butler, ‘Thoughts on Core–Periphery and Small Island Tourism’.

a peculiar “distinctiveness” in order to remain attractive.<sup>83</sup> To this, Butler contends that what is making islands vulnerable in both ecological and cultural terms is not tourism *per se* but a series of global (and globalizing) processes that impact the island *notwithstanding tourism*.<sup>84</sup> For example, he points at the fact that Tuvalu risks disappearing because of rising sea levels<sup>85</sup> or that some cultural practices have been preserved *thanks to tourism* and not in spite of it.<sup>86</sup> If tourism is not the main culprit of island vulnerability, then maybe globalizing processes are.

#### 4.2.2. *Eyes on ecopedagogy*

As anticipated in *Chapter 3*, talks of peripherality, vulnerability, and sustainability—both ecological and cultural—are well-known to ecopedagogists.

When addressing small States—that is, not necessarily small islands—Brock and Smawfield remarked that formal education should be taken into account as an index of peripherality because it could be completely lacking even in presence of other factors.<sup>87</sup> Among the issues they highlight increased “unit costs” when providing education, “brain drain” because of lack of opportunities to advance one’s career, and the indifference of elites because they could educate their children abroad.<sup>88</sup> This resounds with Weaver’s summary of the stereotype that

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<sup>83</sup> Weaver, ‘Core–Periphery Relationships and the Sustainability Paradox of Small Island Tourism’, 18.

<sup>84</sup> Butler, ‘Thoughts on Core–Periphery and Small Island Tourism’, 539.

<sup>85</sup> See also Arjen E.J. Wals et al., *Education for Sustainable Development: Research Overview* (Stockholm: SIDA, 2010), 34.

<sup>86</sup> Butler, ‘Thoughts on Core–Periphery and Small Island Tourism’, 539.

<sup>87</sup> Colin Brock and David Smawfield, ‘Education and Development: The Issue of Small States’, *Educational Review* 40, no. 2 (January 1988): 228–229, <https://doi.org/10.1080/0013191880400209>.

<sup>88</sup> Brock and Smawfield, 228–229.

is usually attached to island communities: “Pejoratively construed, islands have long served as a metaphor for backwardness, stubbornness and irrelevance.”<sup>89</sup>

The Azores do not look like they are in such situation. First, they enjoy several educational institutions, at all levels. Second, their political and economic integration with Continental Portugal counterbalances several economic challenges that are experienced by other island countries, such as Cabo Verde.<sup>90</sup> However, even though the educational infrastructure is sufficiently advanced, Weavers and Butler’s previously illustrated debate foreshadow another type of risk, which is inherently cultural but not linked to the formal education practices addressed by Brock and Smawfield: that is, the endangerment of cultural heritage. Thus, the educational risk concerning small islands might not be related to access to schooling but the loss of ways of life and traditions.

Grant lists some of the causes of such type of endangerment: “Reasons are many, from cultural hegemony, deep political shifts, economic and industrial development, and urbanisation through to the unremitting advance of technology and global information networks.”<sup>91</sup> This is a narrative of vulnerability that reiterates the stereotype of island backwardness; however, instead of stating its causes are of a fixed or historical nature, it relates them to globalizing processes.

Here, it is not my intention to contradict or downplay the risks experienced by the Azores archipelago. However, another way to view cultural heritage in small islands—such as the

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<sup>89</sup> Weaver, ‘Core–Periphery Relationships and the Sustainability Paradox of Small Island Tourism’, 13.

<sup>90</sup> Aleida Cristina Mendes Borges, ‘Youth Agency in Civic Education: Contemporary Perspectives from Cabo Verde’, *Societies* 10, no. 3 (20 July 2020): 3–6, <https://doi.org/10.3390/soc10030053>.

<sup>91</sup> Catherine Grant, ‘Developing a Triage System to Determine Approaches to Sustaining Intangible Cultural Heritage’, *The International Journal of Sustainability in Economic, Social, and Cultural Context* 9, no. 1 (2013): 11–22, <https://doi.org/10.18848/2325-1115/CGP/v09i01/55208>.

Azores—does not linger on their vulnerabilities but on their strengths. Grant claims that, given the enormous variability of intangible cultural heritage, when communities want to preserve it, they have to take things into their own hands—no matter the amount of external help they might receive.<sup>92</sup> That is, says Grant, they can be the only judges of what could be done.

In this respect, the Azores scenario looks particularly healthy. The islands have enjoyed long-standing alliances between the intellectual elites, regional administrative apparatuses, local politicians, and lay people. Therefore, thanks to the Azores Autonomous Region or one of its apparatuses, the archipelago is able to quickly deploy means that integrate the needs of communities with the existing legal framework. One such case is the accreditation of the urban centre of Angra do Heroísmo as a UNESCO World Heritage Site.<sup>93</sup> Such process was not exempt from controversies, but it was first and foremostly a *local* process, initiated locally and discussed locally after the 1976 Constitution. Additionally, as in the UNESCO case, the Azores benefit from the presence of the University, which provides academic consultancy services, which, formally or informally, support in an informed way the political decision-making.

If such scenario sounds excessively positive to the politically sceptic reader, I recommend it to consider the threshold level for an affordance: it is sufficient to show that harmonious policymaking is (a) *possible* and (b) has been pursued in the past with a certain regularity. I concur that such is the case for the Azores.

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<sup>92</sup> Grant.

<sup>93</sup> Universidade dos Açores, Ilha de S.Miguel, Açores, Portugal and Susana Serpa Silva, ‘Angra Do Heroísmo, Azores, Portugal. World Heritage City: An Invitation to Cultural Tourism’, *Revista Rosa Dos Ventos - Turismo e Hospitalidade* 13, no. 2 (18 April 2021): 434–59, <https://doi.org/10.18226/21789061.v13i2p434>.

Therefore, although vulnerability is always behind the corner for such outermost communities, the Azores appear to be a fruit-bearing field for that kind of ecopedagogical research that inquires the workings of sustainable communities. Reprising Gadotti and Misiaszek, the underlying assumption is that unconventional settings can offer exceptional insights on how to manage “our common home.”<sup>94</sup> In other words, the revolutionary aspect of ecopedagogy is that, on top of being in favour of the preservation of minoritarian views, it also empowers them by discarding the question ‘what can we do for this community?’ and instead ask ‘what can this community do for us?’

Before moving on, it is perchance useful to remind some of the investigative tenets that have been outlined in *Chapters 2 and 3*:

1. First, genealogy instructs us to look into practices that merge power and knowledge.
2. Second, we acknowledge the existence of *apparatuses*, which could be conceived as social ‘machineries’ that function in a certain way owing to people’s participation as well as the working of given set of rules and procedures.
3. Third, we understand that *apparatuses*, when directed towards certain strategic goals, are gathered and deployed as *dispositifs*. In turn, *dispositifs* enjoy a history of their own and bring into existence different societal patterns depending on the historical contingencies that dictated their strategic goals.
4. However, as a fourth stage, we agreed that, in ecopedagogical terms, the most intriguing apparatuses are those who come handier to the strategic goals of ecopedagogy itself. Whereas ecopedagogy enjoys its own status and manifesto among intellectuals, its goals are:
  - a) to unveil bottom-up processes,
  - b) to understand which ones foster sustainable standards of living without damaging the moral condition of humanity and the Planet,
  - c) to eventually take inspiration from them to conceive of new educational practices.
5. Fifth, all of the above should be done with focus on communities rather than single individuals, which encourages non-mentalistic and supra-individual accounts of learning, growth, and the resulting wellbeing.

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<sup>94</sup> See Gadotti, *A Carta da Terra na educação*; Misiaszek, ‘Ecopedagogy and Citizenship in the Age of Globalisation’.

### 4.3. Introducing Terceira Island

It is thus with such investigative spirit that this section of the dissertation finally introduces the chosen field of research to investigate the relation between intangible cultural heritage, informal education, and insular context: Terceira Island [*Ilha Terceira*].<sup>95</sup> Some samples concerning Terceira Island have already been offered in both *Chapter 2* and *3*: first, with the anecdotes surrounding bullfighters; second with the pilot study on the practice of picking *lapas* in Terceira Island. It is now time to wrap up those anticipations and address Terceira Island as the direct object of the treatise.

#### 4.3.1. Historical outlook

In their study on maritime accessibility, Pimentel et al. claim that “if we focus on Terceira Island [...], it is possible to verify that if a hub should be addressed in the Azores, Terceira Island would be the chosen one.”<sup>96</sup> In fact, the island is the most easily reachable by sea from all other islands except Flores and Santa Maria.

The point that Pimentel et al. demonstrate scientifically is mirrored by the history of Terceira Island: when the Portuguese first settled in the Azores between 1427 and 1439<sup>97</sup>—and specifically in Terceira since 1450<sup>98</sup>—they eventually decided to use Angra do Heroísmo, the

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<sup>95</sup> The word ‘island [*ilha*]’ is quite often attached to the actual name of the island: ‘Terceira.’ That is, because, in Portuguese, ‘*Terceira*’ means ‘the Third,’ as in the sentence: ‘the third one that was discovered.’ Of the many names Terceira enjoyed throughout the history of its early settlement, this one stood the test of time.

<sup>96</sup> Pimentel et al., ‘Maritime Transportation Dynamics in the Azores Region’, 10.

<sup>97</sup> Vitorino Magalhães Godinho, *A expansão quatrocentista portuguesa*, 2nd ed., História e sociedade (Lisboa: Publicações Dom Quixote, 2008), 226.

<sup>98</sup> Jacques Paviot, ‘Les Flamands Au Portugal Au XVe Siècle (Lisbonne, Madère, Açores)’, *Anais de História de Além-Mar* 7 (2006): 16.

capital of the Terceira Island, as the main hub for the military fleet [*Armada*] assigned to that maritime region of the empire (1520).<sup>99</sup>

The following century, Terceira Island rose to prominence because it harboured the last stronghold of the supporters of António Prior do Crato, claimant to the Portuguese throne against Felipe II of Spain.<sup>100</sup> In 1583, the Spaniards won the siege, and the Azores entered the sphere of influence of the Iberian Union of Crowns, which joined Portugal and Spain for a period.<sup>101</sup> Later (1640–1668), the island would be again at the forefront of the fight against the Spanish, during the events that eventually led to House de Bragança seizing the throne of Portugal.<sup>102</sup> In the Seventeenth and Eighteenth Century, the history of Terceira Island follows the mainstream of Portuguese development and, in line with the rest of the Azores. Moreover, with the Seventeenth Century, Azoreans began to migrate to all Portuguese overseas colonies.<sup>103</sup>

In the Nineteenth Century, Terceira Island continued being culturally and economically active. While it suffered being at the periphery of continental Portugal, it received the attention of foreign investors. For example, the United States deemed it to be strategic

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<sup>99</sup> Ana Catarina Abrantes Garcia, ‘Angra e Funchal, dois portos atlânticos no contexto do império marítimo português. Análise comparativa sobre espaços, estruturas e dinâmicas’, *Nuevo mundo mundos nuevos*, 16 December 2016, sec. 22, <https://doi.org/10.4000/nuevomundo.69954>.

<sup>100</sup> See Carlos Enes, ‘A Resistência Popular Terceirense a Filipe II’, *Discursos: Língua, Cultura e Sociedade* 3, no. 2 (2000): 157–81.

<sup>101</sup> See António José Rodríguez Hernández, ‘The Spanish Imperial Wars of the 16th Century’, in *The War in the Iberian Peninsula, 700-1600*, ed. Francisco García Fitz and João Gouveia Monteiro, Themes in Medieval and Early Modern History (London; New York: Routledge Taylor & Francis Group, 2018), 271.

<sup>102</sup> See José Guilherme Reis Leite, ‘A honra, o serviço e o proveito: os capitães da Praia’, *ARQUIPÉLAGO. História*, 2, 6 (2002): 11–31.

<sup>103</sup> See Matos and Sousa, ‘Settlers for the Empire: The Demography of the Azores Islands (1766–1835)’, 36.

enough to establish a consulate on the island for both military and economic purposes.<sup>104</sup>

Between 1828 and 1834, Terceira was involved in the Portuguese Civil War that had ensued during the struggle between Liberals and Absolutists.<sup>105</sup>

The Twentieth Century is marked by the consolidation of Terceira as a farming hub in the Azores and as a cultural hub with regards to the entire country.<sup>106</sup> In spite of generalized cultural stagnation of ‘official culture’ between the military coup of 1926 and the end of the conservative Estado Novo dictatorship (1974),<sup>107</sup> Terceira was able to preserve a thriving community of intellectuals. After the Carnation Revolution of 1974, the island was shaken by political turmoil, which began to soothe after the creation of the Autonomous Region of the Azores.<sup>108</sup>

Up until the mid-2010s, Terceira profited from Lajes Field, which is a shared Portuguese-American Air Base established after World War II. Its foreign personnel rose to circa 6,500 units (3,000 stable, eventually residing with their families, and 3,500 on a temporary basis) after the Agreement of 1995,<sup>109</sup> but declined after the American interests moved eastwards.<sup>110</sup>

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<sup>104</sup> See Susana Goulart Costa, ‘Progress in the European Periphery: An Impracticable Theory in 19th Century Azores?’, in *Progress(es) – Theories and Practices*, ed. Mário S. Ming Kong and Maria do Rosário Monteiro (3rd International Multidisciplinary Congress (PHI 2017 – Progress(es) – Theories and Practices), Bari, Italy, October 4–7, 2017, Boca Raton, London, New York, Leiden: CRC Press, 2017), 293–97.

<sup>105</sup> See Carlos Enes, ‘A Comemorações do 11 de Agosto, Na Ilha Terceira’, *Discursos: Língua, Cultura e Sociedade* 3, no. 3 (2001): 199–210.

<sup>106</sup> See, e.g., André M. de Almeida, Paula Alvarenga, and David Fangueiro, ‘The Dairy Sector in the Azores Islands: Possibilities and Main Constraints towards Increased Added Value’, *Tropical Animal Health and Production* 53, no. 1 (March 2021): 40, <https://doi.org/10.1007/s11250-020-02442-z>.

<sup>107</sup> See Emília Tavares, ‘Para uma História da Fotografia Portuguesa entre 1939 e 1970: esboço de uma contextualização’, *PontodeAcesso* 10, no. 3 (2016): 33–45.

<sup>108</sup> See Carlos Enes, *A violência da FLA quase tomou conta da ilha* (Angra do Heroísmo: Instituto Histórico da Ilha Terceira, 2020).

<sup>109</sup> Tiago Moreira de Sá, ‘Os Estados Unidos e os Açores: A Base das Lajes e o retraimento americano’, *Relações Internacionais* 51 (September 2016): 70.

<sup>110</sup> Sá, 58–66.



As of 2022, almost 600 years after its first settlement as a Portuguese territory, Terceira is the second most populated of the Azores and enjoys a diverse cultural life. Among the many heritage-related activities mapped by the Azorean Department of Culture [*Direção Regional da Cultura*], Terceira hosts: *danças de Carnaval* [Carnival dances],<sup>111</sup> *Maios* [May puppets],<sup>112</sup> *Sanjoaninas* [St. John's feast],<sup>113</sup> *touradas* [bullfights],<sup>114</sup> *Espírito Santo* [cult of the Holy Ghost],<sup>115</sup> *peregrinação à Serreta* [pilgrimage to Serreta].<sup>116</sup>

#### 4.3.2. Demographics and economics

The Azorean Regional Bureau of Statistics [*Serviço Regional de Estatística dos Açores*] (SREA) provides valuable insights on Terceira's demographics.<sup>117</sup>

First, Terceira has a declining population: between 2011 and 2021, the overall number of residents decreased from 56,437 to 53,244 (-5.66%).<sup>118</sup> Second, its economy is not growing steadily. Compared to the regional mean, between 1980 and 2010, Terceira Island saw an increase in its development index but a decrease in two of its specific components. According to SERA's Composite Index of Intra-Regional Development [*Indicador Compósito de Desenvolvimento Intra-Regional*] (ICDIR), Terceira grew from 96.8 points in 1980 to 102 points in 2010, with a minor decline circa 2000.<sup>119</sup> However, it appears that such increase in

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<sup>111</sup> Antonieta Costa, *Açores - Festividades Populares e Mitos Arcaicos: Na Nova Geografia Atlântica* (Angra do Heroísmo: Governo dos Açores, n.d.), 24.

<sup>112</sup> Costa, 43.

<sup>113</sup> Costa, 54, 57, 59.

<sup>114</sup> Costa, 64–66.

<sup>115</sup> Costa, 66.

<sup>116</sup> Costa, 79.

<sup>117</sup> SREA, 'Indicador Compósito de Desenvolvimento Intra-Regional (ICDIR-Açores) 1980-2010', Informação estatística (SREA – Serviço Regional de Estatística dos Açores, 19 May 2016), [https://srea.azores.gov.pt/Conteudos/Artigos/detalhe\\_artigo.aspx?idc=26&ida=4894](https://srea.azores.gov.pt/Conteudos/Artigos/detalhe_artigo.aspx?idc=26&ida=4894).

<sup>118</sup> INE, 'Censos 2021: Contámos com todos – resultados provisórios'.

<sup>119</sup> SREA, 'Indicador Compósito de Desenvolvimento Intra-Regional (ICDIR-Açores) 1980-2010', 5.

the index is mostly due to environmental sustainability, whose relative figure grew from a meagre 76.6 points in 1980 to 103.4 points in 2010.<sup>120</sup> Conversely, compared to other islands of the archipelago, both economic competitiveness and social cohesion decreased, even though they still score above the regional mean.<sup>121</sup> This does not mean development and quality of life decreased in terms of absolute values, but that Terceira is gradually losing momentum with regards to other islands of the Azores.

Notwithstanding the above, it appears that, in 2010 (the last year considered by the 2016 SREA report), Terceira Island could still be considered a model of development, since it was the only island that managed to score above the mean in all three components.<sup>122</sup>

#### **4.4. Globalization: the case of the Lajes Air Base**

The Lajes Field, or Lajes Air Base, is an emblematic example of globalization processes at work on Terceira Island. Drawing on Kochis, it is possible to retrace the history of this military base on Portuguese territory<sup>123</sup>. This section will address the idiographic peculiarities of Lajes Field by locating them within the broader context of Terceira's involvement in globalization; this will be apparent by identifying three trends acting upon Terceira: globalizing processes, internationalizing processes, and localizing processes. Such concepts are pivotal in Dicken's study of globalization.<sup>124</sup> In this view, Lajes Field is not a standalone case but represents the paradigm of Terceira's island geographic placement.

##### *4.4.1. Globalizing processes: all the World is America*

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<sup>120</sup> SREA, 5.

<sup>121</sup> SREA, 8.

<sup>122</sup> SREA, 9.

<sup>123</sup> Daniel Kochis, 'Lajes Field: Why This Airbase Is Important to U.S. Strategic Interests', 2020, <http://report.heritage.org/bg3566>.

<sup>124</sup> Peter Dicken, *Global Shift: Mapping the Changing Contours of the World Economy*, 6th ed (New York: Guilford Press, 2011), 7.

At the dawn of the Nineteenth Century, as the Azores enjoyed the technological and cultural developments, the United States set up a vice-consulate on the island of Faial (1790), which was later raised to consulate (1795)<sup>125</sup>: now placed in São Miguel Island, it is “the oldest, continuously-operating U.S. Consulate in the world.”<sup>126</sup>

The American interest was followed by an improvement of the Azorean agricultural output, which began in the 1830s with the plantation of orange trees in São Miguel and Terceira, which continued at least up until the 1860s.<sup>127</sup> This same period saw the flourishing of the “Dabney Empire,” which is named after John Bass Dabney, appointed consul in 1806: acting as a local tycoon, Dabney profited from the export of oranges from São Miguel and Terceira, wine from Pico; in exchange, he created infrastructures in Faial that catered to the whaling industry.<sup>128</sup>

Mindful of the role played by the Azores islands in World War I,<sup>129</sup> with the advent of World War II the fighting parties began contending their presence on the archipelago—Portugal being a neutral country.<sup>130</sup> Notwithstanding German attempts to establish resupply stations, eventually the dice was cast in 1943, when the United Kingdom and Portugal found common grounds and drew on a 1373 Treaty as a justification for Anglo-Saxon military development on the islands.<sup>131</sup>

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<sup>125</sup> Paulo Fontes, ‘225 anos do consulado dos EUA nos Açores: a mais antiga representação diplomática do mundo’, *Janus*, 30 October 2020.

<sup>126</sup> U.S. Embassy & Consulate in Portugal, ‘History of the Consulate’, Institutional website, *U.S. Embassy & Consulate in Portugal* (blog), 2022, <https://pt.usembassy.gov/embassy-consulate/ponta-delgada/history-consulate/>.

<sup>127</sup> Goulart Costa, ‘Progress in the European Periphery: An Impracticable Theory in 19th Century Azores?’, 293.

<sup>128</sup> Goulart Costa, 294.

<sup>129</sup> Sá, ‘Os Estados Unidos e os Açores: A Base das Lajes e o retraimento americano’, 68.

<sup>130</sup> Kochis, ‘Lajes Field: Why This Airbase Is Important to U.S. Strategic Interests’, 4–5.

<sup>131</sup> Kochis, 5.

Consequently, Lajes Field was built on Terceira Island, which increased the Allies' ability to control the Atlantic area of operations.<sup>132</sup> After the War, in 1946, Lajes Field was given to Portugal, with the commitment to withdraw American and British forces by December 1949; however, with the creation of NATO in April 1949, US presence in the Azores was re-negotiated and resulted in long-lasting cooperation between the United States and Portugal, which lasted throughout the Cold War (1947–1991) and well into the Second Gulf War (2003–2011).<sup>133</sup>

However, citing budgetary reasons and possibly because of shifting strategic interests,<sup>134</sup> the United States reduced their forces to one-third of their original garrison, downgrading from 3,000 units to about 1,100.<sup>135</sup> Further cuts were introduced in 2015, with the following consequences: US forces were limited to 165 units and the number of Portuguese employees was halved; as of 2020, only 178 US staff members stay on the island.<sup>136</sup>

Kochis' report is focused on advocacy for the upgrading of Lajes Field, citing increased Russian interests in the Atlantic and the fact Lajes is now “a shadow of its former scope” and that is mistakenly “perceived as a Cold War relic”<sup>137</sup>. To the cultural heritage scholar and education scientist, however, the lifespan of Lajes Field is evidence of how globalization has impacted Terceira Island.

In the perspective of the United States, the creation and exploitation of Lajes Field is what Dicken would call a “*globalizing process*”.<sup>138</sup> In his definition, the two telling signs of

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<sup>132</sup> Kochis, 5.

<sup>133</sup> Sá, ‘Os Estados Unidos e os Açores: A Base das Lajes e o retrainamento americano’, 69; Kochis, ‘Lajes Field: Why This Airbase Is Important to U.S. Strategic Interests’, 6.

<sup>134</sup> Sá, ‘Os Estados Unidos e os Açores: A Base das Lajes e o retrainamento americano’, 59.

<sup>135</sup> Kochis, ‘Lajes Field: Why This Airbase Is Important to U.S. Strategic Interests’, 7.

<sup>136</sup> Kochis, 7.

<sup>137</sup> Kochis, 2–3.

<sup>138</sup> Dicken, *Global Shift*, 7.

globalizing processes are “geographical spread” and “functional integration”.<sup>139</sup> This is apparent in the case of Lajes Field because its presence is a tile of the jigsaw puzzle of the American projection of power at a global scale: The American forces enjoy a high degree of integration, work toward common goals, and replicate their functioning—*mutatis mutandis*—all over the globe. As Moreira de Sá puts it: “[they entail] an expanded system of political and military alliances, as well as bases in countries all around the world, which guarantee [United States’] presence in all the regions of the planet”.<sup>140</sup>

#### 4.4.2. *Internationalizing processes: learning from the Americans*

To Azorean eyes, however, Lajes Field represented first and foremost an experience of internationalisation. Dicken defines “*internationalizing processes*” as “simple geographical spread of economic activities across national boundaries with low levels of functional integration”.<sup>141</sup> This definition is also sustained by Ratter.<sup>142</sup>

If we waive the notion of “national boundaries” and substitute it with that of regional boundaries, this means that internationalisation occurs when foreign activities brim over their places of origin and begin affecting a territory—say, an island—*without* mutual coordination for a common goal. A consequence of such process is that the target territory becomes the passive subject of external interests and processes, and that economic and cultural processes unfold there *notwithstanding* local agency.

*Qua* Azoreans, Terceirans had a long-lasting tradition of emigration, but the Lajes Field meant that it was now foreigners (Americans) who would come and settle on the island.

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<sup>139</sup> Dicken, 7.

<sup>140</sup> Sá, ‘Os Estados Unidos e os Açores: A Base das Lajes e o retraimento americano’, 59.

<sup>141</sup> Dicken, *Global Shift*, 7.

<sup>142</sup> Beate M. W. Ratter, ‘Introduction to the Geography of Small Islands’, in *Geography of Small Islands*, by Beate M.W. Ratter (Cham: Springer International Publishing, 2018), 17, [https://doi.org/10.1007/978-3-319-63869-0\\_1](https://doi.org/10.1007/978-3-319-63869-0_1).

Moreover, Americans brought with them a series of customs, habits, and technologies, which were soon perceived by the locals to be invaluable perks. This was a stark reversal of the ‘Chico Roico’ narrative,<sup>143</sup> whose features were commonly found in many Azorean expats: formerly, islanders would leave to earn a living and make savings on foreign land and come back wealthier and more experienced; afterwards, it was Terceira’s turn to become a subject of intensive development as jobs increased to cater the needs of the growing military community.

Initially, the level of integration between American and Azorean (Portuguese) culture was limited, and the inhabitants of Terceira became the passive receivers of American cultural artefacts and practices, which were treated locally as a novelty. During fieldwork, an informant born in the 1970s reported that the first time he watched TV—and, more specifically, *sports*—the broadcast was showing a baseball match on the American channel. He and concurred: “I knew nothing of baseball; we do not really play baseball here.”

Thanks to the American presence, Lajes Field and the surrounding Terceira Island could boast the first television broadcast of the country and also of the first foreign one. Brito comes to a similar conclusion: exception made for the Lajes Field workers, Portuguese nationals would not enjoy close relationships with the Americans; however, they would keep witnessing how Americans lived their lives, dressed up for an occasion, or celebrated their own festivals.<sup>144</sup>

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<sup>143</sup> Chico Roico was a Terceiran mason who became famous in the first half of the Twentieth Century for having come back from the United States and animated the local Carnival with his witty plays. He was literate but mostly self-taught. For his full story, see Carlos Enes, *O Carnaval na Vila Nova* (Lisbon: Salamandra, 1998).

<sup>144</sup> José Henrique Silveira de Brito, ‘Na ilha de Nemésio, invadida pelos Americanos’, in *Condição do ilhéu*, ed. Roberto Carneiro, Onésimo Teotónio Almeida, and Artur Teodoro de Matos, Coleção Estudos e documentos (Lisboa: Universidade Católica Portuguesa, 2017), 447–448.

Álamo Oliveira—a Terceiran poet and writer born in the *freguesia* of Raminho in 1945—immortalized the atmosphere of post-World War II Lajes Field with the following words:

“On the island, life changed, not because of concerted development, like trees that know how to grow without pruning or sulphating, but because of the whims of war or the unpredictable forces that nature unleashed in a crude and blind way. And there came news from other worlds with increasing and daily frequency and everyone was realizing that living on the island was just better than being dead. The Lajes base, rightly known as the American base, absorbed poor people who soon took a liking to money, to different flavours of food and drinks, to the aesthetics of a bright outfit that smelled of peppermint and pennyroyal, to the musical language of words whose macaronic outcomes were inevitable.”<sup>145</sup>

Concerning these quasi-autobiographical remarks by Álamo Oliveira, in his dissertation Rosa draws on the verses of Pedro Silveira—whose birthplace is Flores Island—to summarize the hunger of Azoreans who would later turn into migrants:<sup>146</sup>

“Just this:  
A dim sky, a gull  
hovering. Sea. And a boat in the distance:  
Hungry eyes guessing, at the bow,  
Californias lost in plenitude”<sup>147</sup>

From an educational point of view, a case of internationalisation linked to Lajes Field is represented by the introduction of English as a *lingua franca* on Terceira Island. English as a Foreign Language was not a new phenomenon *per se*, since it had already been used in British-Portuguese relations and, most prominently, in American-Azorean trade relations that flourished with the orange, whaling, and wine trades of the first half of the Nineteenth

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<sup>145</sup> Álamo Oliveira, *Já não gosto de chocolates*, Colecção Garajau 56 (Lisboa: Edições Salamandra, 1999), 31.

<sup>146</sup> Manuel Duarte Gonçalves da Rosa, ‘Açorianos na terra da abundância: diálogos multiculturais a partir de Álamo Oliveira, Marcolino Candeias e Onésimo Almeida’ (Dissertação de mestrado, Angra do Heroísmo (PT), Universidade dos Açores, 2020), 18, <http://hdl.handle.net/10400.2/12037>.

<sup>147</sup> Pedro da Silveira, *A ilha e o Mundo* (Lisboa: Centro Bibliográfico, 1952), 17.

Century<sup>148</sup>. Notwithstanding this, Lajes Field gave a specific boost to Terceira. It engendered motivation on behalf of the locals to learn English and, in addition, it raised the standing of those who had returned from their migratory careers and had a fair command of the language. Cabral and Nobre maintain that current Portuguese political discourse on language learning is heavily centralised and biased towards content learning (e.g., grammar) rather than communication skills—at the expense of decades of innovative practices developed by local teachers.<sup>149</sup> In the Azores, my fieldwork showed that language learning motivation is driven by the tourism industry and the growing integration of Portugal with world market economy<sup>150</sup>—that is, mixing external needs with an internal push.

However, close examination of Terceira in the post-war period shows that English language learning trickled down from Lajes Field to the whole island. During fieldwork, this was seen more clearly at Terceira's branch of the Universidade dos Açores, Campus of Angra do Heroísmo: the library offices, although rather small in size,<sup>151</sup> feature an 'American Space' with a display of flags of the United States, and a couple of personal computers. Workers and passers-by explained to me that the 'American Space' was being funded by the Fulbright

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<sup>148</sup> Goulart Costa, 'Progress in the European Periphery: An Impracticable Theory in 19th Century Azores?'

<sup>149</sup> Maria L. Cabral and Anabela M. Nobre, 'ELF Teaching in Portuguese Schools: The Not-so-Good Old Days Are Back', *Theory and Practice in Language Studies* 5, no. 11 (22 November 2015): 2194, <https://doi.org/10.17507/tpls.0511.02>.

<sup>150</sup> Anna Odrowąż-Coates, *Socio-Educational Factors and the Soft Power of Language: The Deluge of English in Poland and Portugal* (Lanham, MD: Lexington Books, n.d.), 94.

<sup>151</sup> Most action takes place in downtown's Biblioteca Pública e Arquivo Regional Luís da Silva Ribeiro.



Program. The latter is a renowned programme aimed at improving intercultural relations,<sup>152</sup> and is recognized as one of the channels through which American soft power is exerted.<sup>153</sup>

At the American Space I found three advertising brochures. The first one is entitled *Information Resource Center*, which is promoted as:

“The authoritative source for information about current American government and politics, foreign policy and international relations, U.S. economy and foreign trade, the environment, history, society, and culture.”<sup>154</sup>

The Resource Center, which overlaps with the American Space, offers the Portuguese public an opportunity to browse databases that are useful for both the public and an academic audience. It includes:

“Business and trade information, [...] legal [...] information, [...] full text journals [...], Federal News Service [...], online access to federal, state and municipal governments, law firms, and media outlets and a range of associations [...], current historic economic and trade statistics.”

Additionally, users can access a series of academic resources. Among these, the *eLibrary USA*, described in the homonymous leaflet, has the stated goal of fighting “fake information,” and provides a further set of digital resources that range from academic journal access to resources for teachers to plan Socratic seminars and engaging lessons on the latest issues. All of the above is supplemented by an outline of all Fulbright’s “special programs” available to Portuguese citizens, such as: the opportunity for “students” or “mid-career [...] scholars [and] educators” to study US Institutes; “advising programs” to help Portuguese students choose

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<sup>152</sup> US Bureau of Educational and Cultural Affairs, ‘The Fulbright Program’, Institutional website, *Bureau of Educational and Cultural Affairs* (blog), 2022, <https://eca.state.gov/fulbright>.

<sup>153</sup> Oleksandr Panfilov and Olga Savchenko, ‘US EDUCATIONAL FOREIGN POLICY AS A “SOFT POWER” FACTOR: RETROSPECTIVE ASPECT’, *The Bulletin of Yaroslav Mudryi National Law University. Series: Philosophy, Philosophies of Law, Political Science, Sociology* 4, no. 51 (11 November 2021), <https://doi.org/10.21564/2663-5704.51.242016>.

<sup>154</sup> Embassy of the United States of America, ‘Information Resource Center’, 2020, Col. Andrea Mattia Marcelli.

the most suitable American college or Graduate school; and the “Fulbright-Schuman Program,” which supports academic researchers and offers “visa sponsorship” to carry out their studies in the United States.<sup>155</sup>

A precursor of the “American Space” is the Open Day of the Lajes Field. Brito reports that there used to be Open Days in which Portuguese civilians were allowed into the Airbase to attend exhibitions organized by both the American and Portuguese forces.<sup>156</sup> Most of such exhibitions were airplane themed.<sup>157</sup> This was also an opportunity to buy goods from the US outlets: “chocolate, soft drinks, and popcorn.”<sup>158</sup> Such opportunity was offered also on regular days, but the requirements to access Lajes Field were stricter and the amount of purchasable goods was more limited.<sup>159</sup>

In broader cultural terms, Valverde Contrera and Keese maintain Terceira is “the most ‘American’ of the islands,” to the point of the *Estado Novo* fascist authorities worried about this and, although willing to cooperate with the United States, were reluctant to accept foreign injection into the alleged conservative national culture they were trying to construct<sup>160</sup>.

An outstanding case of intercultural relations is that of Miss Zabilka, a former high school music teacher at Lajes Field.<sup>161</sup> In the early 1960s, she became music director of the Filarmónica União Praiense [Philharmonic Society of Praia], which was already gathering

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<sup>155</sup> Fulbright Portugal, ‘Special Programs Administrated by Fulbright’, 2020, Col. Andrea Mattia Marcelli.

<sup>156</sup> Brito, ‘Na ilha de Nemésio, invadida pelos Americanos’, 444.

<sup>157</sup> Brito, 444–445.

<sup>158</sup> Brito, 445.

<sup>159</sup> Brito, 444–445.

<sup>160</sup> Beatriz Valverde Contreras and Alexander Keese, ‘The Limits of Authoritarian Rule at the Periphery: The PIDE, the American Airbase, and Social Control on Terceira Island, Azores, 1954–1962’, *Journal of Social History* 52, no. 4 (1 May 2019): 1312, <https://doi.org/10.1093/jsh/shx163>.

<sup>161</sup> Brito, ‘Na ilha de Nemésio, invadida pelos Americanos’, 449.

amateurs from all over the Azores who had moved to Praia (next to the Field) to seek employment.<sup>162</sup> She left her own footprint on the local *filarmónica* by introducing soloists in the orchestra and by giving the participants a taste for showing off in unpredictable ways during a show.<sup>163</sup>

Brito does not provide further biographical information on such teacher. However, a 1975 entry of the *Guantanamo Gazette* mentions that a woman named “Gladys Zabilka”, also known as “Miss Zabilka,” had just returned to the US Naval Base in Guantanamo Bay.<sup>164</sup> According to the newspaper, after a decade of teaching in Iowa, in 1949 she joined the Department of Defense Overseas School System and travelled the world working at different US bases, including the Azores.<sup>165</sup> The same details are mentioned in the obituary of “Gladys Mae Zabilka (1917–2001).”<sup>166</sup>

In her job, Zabilka intentionally pioneered intercultural relations, especially in the field of music: she used it to invite local musicians to “entertain” and teach students at her schools.<sup>167</sup> Concerning the Azores, Internet user and former Zabilka’s student Tim Joswiak sheds some light in a comment to a music blog:

“She gave us mimeographed handouts about the Azores and the culture of the people there. There were a lot of blue pages of these handouts, some of the pages included native song lyrics. I was looking for her handouts just the other day, I’m sure I still have them! One song was ‘Numa Casa Portuguesa Fica Bem.’ Another one was the Portuguese National Anthem, it began, ‘Herois do Mar, nobre povu, Nacao valente y

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<sup>162</sup> Brito, 449.

<sup>163</sup> Brito, 449.

<sup>164</sup> Anonymous, ‘Gladys Zabilka Returns as Elementary Principal’, *Guantanamo Gazette*, 23 October 1975.

<sup>165</sup> Anonymous.

<sup>166</sup> Anonymous, ‘Gladys Mae Zabilka 1917–2001’, *Pensacola News Journal*, 16 December 2001.

<sup>167</sup> Gladys Zabilka, *Customs and Culture of the Philippines* (Rutland, VM, and Tokyo: Charles E. Tuttle, 1970), back cover, <http://site.ebrary.com/id/10961943>.

immortal.’ I remember that she taught us this national anthem and some other songs, maybe folk songs, and then she took us on tour!’<sup>168</sup>

*Uma Casa Portuguesa* was a song popularized by all-time Portuguese celebrity Amália Rodrigues.<sup>169</sup> Joswiak’s post is also informative of the relation between students and islanders:

“We had gigs at different places around the island. We sang a cappella, if memory serves. We sang these Portuguese songs to the islanders. It seemed like they appreciated hearing the children sing their songs to them in their own language. I remember that when we finished singing in Portuguese their national anthem, the audience gave us a tremendous round of applause! Afterward, she had our final performance on the Base and had it broadcast over the military television station! My father actually got a picture of my face on the TV screen as the camera panned along the rows of our choir.”<sup>170</sup>

The above testimony enables us to outline the approach of Zabilka, which appears to follow this procedure:

- (a) Acquaintance with local culture
- (b) Collection of music materials and their provision to US students (popular songs, national anthems...)
- (c) Preparation of shows and events based on such materials
- (d) Restitution to the community (e.g., choir tour around the island, visiting some *freguesias*).

Through music, she achieved various learning outcomes: intercultural sensitivity; competence in the folklore of the island; usage of the local language; musical training.

#### 4.4.3. Localizing processes: taking the initiative

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<sup>168</sup> Tim Joswiak, ‘Michael, I Remember Her, Too. Wasn’t She a Force?’, *The Drummer’s Almanac* (blog), 28 August 2019, <https://thedrummersalmanac.com/what-made-you-choose-the-drums/#comments/257>.

<sup>169</sup> Amália Rodrigues, *Uma Casa Portuguesa* (London: Abbey Road, 1953).

<sup>170</sup> Joswiak, ‘Michael, I Remember Her, Too. Wasn’t She a Force?’

The American presence in post-World War II Terceira did also trigger localizing processes. Dicken defines “*localizing processes*” as “geographically concentrated economic activities with varying degrees of functional integration.”<sup>171</sup>

Concerning Lajes Field, localizing processes took the shape of a series of local activities meant to cater for the residing military personnel and their families. Economic activities connected to the Lajes Field covered all industries: from cleaning services to food delivery. Additionally, all around the island complementary services boomed that could serve the needs of off-duty servicemen and their families. As Fortuna et al. remark, military bases improve local economies through their spending and infrastructure development.<sup>172</sup>

Borges remarks how Lajes Field fostered the growth of a parallel economy due to its tax waivers and exemptions: produce were priced differently depending on whether they were meant to be sold at the air base or in the regular island markets.<sup>173</sup> Alfonso et al. stress on how the most recent developments of these informal markets were determined by the *Lajes Agreement*,<sup>174</sup> which was signed in 1995 by Portugal and the United States.<sup>175</sup> It regulated relations between Portugal and the United States regarding Lajes Field in Terceira Island. In

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<sup>171</sup> Dicken, *Global Shift*, 7.

<sup>172</sup> Mário J. A. Fortuna, João C. A. Teixeira, and Francisco J. F. Silva, ‘Gone with the Winds of Peace: The Regional Economic Effects of Military Base Downsizings and Closures’, *Defence and Peace Economics*, 4 May 2021, 1, <https://doi.org/10.1080/10242694.2021.1921463>.

<sup>173</sup> Sara Moniz Borges, ‘A Economia Não Registada na Região Autónoma dos Açores: uma análise por ilha’ (Dissertação de Mestrado, Porto, Universidade do Porto, 2017), 2, <https://hdl.handle.net/10216/107462>.

<sup>174</sup> Óscar Afonso et al., *A economia não registada na Região Autónoma dos Açores*, Coleção Tramas 4 (Edições Húmus, 2013), 122–123, <https://www.fep.up.pt/docentes/cpimenta/textos/pdf/e004.pdf>.

<sup>175</sup> Assembleia da República, ‘Resolução da Assembleia da República n.º 38/95 Acordo de Cooperação e Defesa entre a República Portuguesa e os Estados Unidos da América, o Acordo Técnico e o Acordo Laboral’, Pub. L. No. 38/95, Instrumento Bilateral (1995), <https://www.ministeriopublico.pt/es/instrumento/acordo-de-cooperacao-e-defesa-entre-republica-portuguesa-e-os-estados-unidos-da-america-1>.

the Annex I of the included Technical Agreement, it allowed for important fiscal exemptions for the United States' forces.<sup>176</sup> The key aspect of Annex I is that its Article II extended exemptions to Portuguese contractors that catered to American troops in Lajes Field: it applied to both Portuguese nationals that imported goods from abroad to sell them to United States' personnel, and to the 'export' of Portuguese produce to the American territory in Lajes Field. Given it is sanctioned by bilateral agreements, the resulting parallel economy does not amount to a black market, even though Article V of the same document forbids Portuguese nationals from acquiring the same goods imported under the advantageous tax scheme unless they paid import duties as usual.

The existence of regulating treaties and of an international market of goods speaks volumes about the mostly *globalizing* and *internationalizing* nature of Lajes Field. However, the *localizing* elements come into play in the shape of the islanders' sense of entrepreneurial initiative, which translated into economic activities conceived to cater for the American troops.

This phenomenon began in the 1950s, with the expansion of the local real estate sector to accommodate the families of US military personnel, since Lajes Field did not have enough accommodation facilities.<sup>177</sup> During fieldwork, some informants told me the phenomenon was still prominent in the 1970s and 1980s, with several local buildings being rented over to American servicemen and their families. Some chose their stay even as far as Biscoitos, which is more than 18 km away from the Lajes Field. However, this real estate phenomenon declined once the American forces began to build their own housing and premises closer to the landing strip.

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<sup>176</sup> Afonso et al., *A economia não registada na Região Autónoma dos Açores*, 123.

<sup>177</sup> Brito, 'Na ilha de Nemésio, invadida pelos Americanos', 446–447.

Further information is indirectly provided by an air accident that occurred on April 15, 1984.<sup>178</sup> As later reported by controller Bill Hewett, a Lockheed C-130 Hercules of the US Air Force suffered an engine failure during landing. The flight could safely continue thanks to the other three working engines of the aircraft, but the crew forgot that, during the slowdown phase, they had to reverse only one engine out of the two intact ones of the left wing. Instead, they reversed all of them. This resulted in excessive force on the left wing compared to the damaged right wing, which caused the airplane to turn and crash as it approached the landing strip. The ensuing fire was quickly extinguished by the ground force and there were no casualties among the crew—the only injury being a broken finger.<sup>179</sup>

Reflecting upon the effects of the crash, Hewett adds:

“Some side notes. The aircraft was carrying the produce flown in weekly for the commissary on base, No [*sic*] big deal in the scope of things but fruits and veggies were in short supply unless you went local.”<sup>180</sup>

Such statement suggests that the US Air Force personnel was used to receive some food deliveries through the Air Force’s channels and not to buy them specifically from the locals. This is possibly because, until the agreements of 1995, no specific advantages were given to Portuguese providers; and even so, it must not have been easier for private entrepreneurs to tackle a global system of purchases that was managed in a centralised way by the military force of another country.

Notwithstanding this, it appears that the US forces preferred local meat and fish produce, to the point that, beginning with the 1950s, the slaughterhouse of Praia began processing up to five cows per day under the supervision of American health inspectors.<sup>181</sup>

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<sup>178</sup> Bill Hewett and Ronan Hubert, ‘Crash of a Lockheed C-130E Hercules in Lajes’, Public archive, *B3A – Bureau of Aircraft Accidents Archives* (blog), 2022, <http://baaa-acro.sindev.ch/crash/crash-lockheed-c-130e-hercules-lajes>.

<sup>179</sup> Hewett and Hubert.

<sup>180</sup> Hewett and Hubert.

Brito, who spoke with eyewitnesses born in the 1940s, maintains changes were imposing. For example, he claims that the city of Praia da Vitória—which is about 3.5 km from Lajes—was utterly transformed: “With the building of the Lajes Base, the City of Praia da Vitória underwent deep changes, both in physical terms and in terms of the lifestyle of its inhabitants.”<sup>182</sup>

Brito collects several entries from Nemésio’s poems to illustrate this point;<sup>183</sup> the main source is 1950’s *Festa Redonda*, which includes various poems [*cantigas*] on Praia and its surrounding area.<sup>184</sup> For example, Nemésio good-heartedly remarks how the city had become snob by rejecting the bullfights it used to cherish and how the world powers, driven by engines and in love with gasoline, had turned the crops of Lajes into a flat wasteland.<sup>185</sup>

Additionally, Brito observes: “With the arrival of the Americans, a new group [of workers] appeared: those that worked in the ‘*Campo* [Field],’ which is the name many kept using for the Lajes Airbase, at least until the end of the 1950s.”<sup>186</sup> At the outset, these workers used to travel by foot or by bike; however, their commuting had soon the effect of triggering the birth of private and public transportation systems: “Carts were replaced by taxis and trucks, the ‘Green Company [*Companhia Verde*]’ and the ‘Red Company [*Companhia Vermelha*],” were the first active ones, and later joined forces in the mid-1950s and became *Empresa de Viação Terceirense*—which is still active as of 2022.<sup>187</sup>

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<sup>181</sup> Brito, ‘Na ilha de Nemésio, invadida pelos Americanos’, 447.

<sup>182</sup> Brito, 442.

<sup>183</sup> Brito, 442–443.

<sup>184</sup> Vitorino Nemésio, *Festa redonda: Décimas e cantigas de terreiro oferecidas ao povo da Ilha Terceira* (Lisboa: Livraria Bertrand, 1950).

<sup>185</sup> Nemésio.

<sup>186</sup> Brito, ‘Na ilha de Nemésio, invadida pelos Americanos’, 443.

<sup>187</sup> Brito, 445.



Another sector of development was the harbour, both civilian and military. Not everything required by Lajes Field came to Terceira by plane: most materials were being shipped by boat.<sup>188</sup> Additionally, it should not be overlooked the role played by the Portuguese military, which was actively cooperating with the Americans for the development of the airbase. Consequently, even when provisions to Americans themselves were limited owing to the global nature of the US military supply system, the island could still count on national purchases of all sorts, to provide for the Portuguese staff.<sup>189</sup>

All of the above reinforce the idea that most of the value islanders were getting from the base was represented either by:

- a) the private spending of US staff on short leave, which should explain why cafeterias began appearing all over the town of Praia;<sup>190</sup>
- b) the real estate sector, as anticipated above;
- c) basic employment—that is, anything that could be done by civilians was possibly contracted and outsourced by the military;<sup>191</sup>
- d) transport and shipping services, both local and maritime.

Concerning the issue of non-regulated economy,<sup>192</sup> although information on it is scant and mostly anecdotal, indirect evidence is provided by the shock caused by the reduction of American commitment in the Azores, starting with the drawdown announcement of December 2012.<sup>193</sup> That is, a shock that came no matter the gradual reduction of US commitment of the previous two decades: simulations by Fortuna et al. predict that, unless joint government (Portugal) and foreign (US) aid is provided, by 2030 Terceira's

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<sup>188</sup> Brito, 446.

<sup>189</sup> Brito, 446.

<sup>190</sup> Brito, 446.

<sup>191</sup> Brito, 449.

<sup>192</sup> Borges, 'A Economia Não Registada na Região Autónoma dos Açores: uma análise por ilha'.

<sup>193</sup> 65th Air Base Wing Public Affairs, 'Lajes Field Drawdown as Part of Force Structuring Announced', Institutional website, *Air Force* (blog), 13 December 2012, <https://www.af.mil/News/Article-Display/Article/109986/lajes-field-drawdown-as-part-of-force-structuring-announced/>.

unemployment rate would range between 5.33% and 9.60%.<sup>194</sup> Localized elements of the economy come into play when it is shown that the population groups most affected by the closure of the air base are the low-income ones: even when mitigating action is undertaken by the Regional government, if previous spending patterns are followed they would benefit only high-income groups.<sup>195</sup>

#### 4.4.5. *Economic vulnerability: is Terceira at risk?*

“As a border region, the archipelago has been continuously vulnerable to the attacks of pirates and corsairs, and never ceased being a periphery, fragile and distanced from the centres of power.”<sup>196</sup>

With these words, Corrêa cradles the Azores in the narrative concerning islands’ peripheral vulnerability. Moncada et al. concur to this judgement with regards to Small Island States, which we have previously deemed comparable to the Azores Autonomous Region:

“In view of the perceived structural and institutional weaknesses of small island states, and the fact that traditional economic indicators such as GDP are unable to capture these weaknesses, the UN has supported the development of an Economic Vulnerability Index. This is ‘a measurement of the lack of economic resilience arising from the relative inability of a small island state to shelter itself from forces outside its control’.”<sup>197</sup>

According to Kołodziejcki, vulnerability is the result of the outermost regions’ dependency “on a few products (often agricultural products or natural resources).”<sup>198</sup> For instance, as Amaral observes, in 1984—that is, ten years after the demise of the *Estado Novo*—Azores

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<sup>194</sup> Fortuna, Teixeira, and Silva, ‘Gone with the Winds of Peace’, 18.

<sup>195</sup> Fortuna, Teixeira, and Silva, 21.

<sup>196</sup> Corrêa, ‘Certificação de produtos tradicionais, educação e inovação de um patrimônio regional: o caso do “Bolo Lêvedo dos Açores”’, 149.

<sup>197</sup> Moncada et al., ‘Islands at the Periphery: Integrating the Challenges of Island Sustainability into European Policy’, 56; The internal quote is taken from: Lino Briguglio, ‘The Economic Vulnerabilities of Small Island Developing States’, Study commissioned by CARICOM for the Regional Technical Meeting of the Global Conference on the Sustainable Development of Small Island Developing States (Port of Spain, Trinidad and Tobago: CARICOM, July 1993), 1–2 This latter document was not available to me during research.

<sup>198</sup> Kołodziejcki, ‘Outermost Regions (ORs)’.

displayed a “fragmented” economy, with little “economic integration” between the islands.<sup>199</sup>

Opportunities of development depended heavily on the improvement of the transport sector—for better inter-island integration—and on their ability to profit from tourism, geothermal energy, and their extensive Exclusive Economic Zone.<sup>200</sup>

Reduced economies mean less internal competition and lower ability to compete with external actors; as a consequence, wages are lower.<sup>201</sup> In Moncada et al.’s study, carried out in 2009, Azores displayed the following negative features:

- “Low potential for economic diversification,”<sup>202</sup> which means difficulties trying to detach economic activities from the few “driving” sectors.<sup>203</sup>
- “Waste management challenges due to small size and remoteness.”<sup>204</sup> This relates to the ability to recycle and to use energy for such purpose; given islands have limited landmass, it makes it harder to store hard waste.<sup>205</sup>
- “Insularity and peripherality,”<sup>206</sup> which determine high costs of transport.<sup>207</sup>
- “Low levels of education and training:”<sup>208</sup> islands affected by such drawback experience “brain drain,” increased costs to obtain education (e.g., travel costs to the continent), and struggle finding qualified workers ready to come to the islands to undertake complex yet essential tasks.<sup>209</sup>

Additionally, the Azores feature a low GDP per capita, which is “75% less than the UE-27 average.”<sup>210</sup> At the same time, however, Azores have been experiencing new opportunities.

For example, circa 2006 (three years prior to the Moncada et al.’s study), Camara observed:

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<sup>199</sup> Amaral, ‘Development of the Azores: Problems and Prospects’, 144.

<sup>200</sup> Amaral, 145–146.

<sup>201</sup> Moncada et al., ‘Islands at the Periphery: Integrating the Challenges of Island Sustainability into European Policy’, 58.

<sup>202</sup> Moncada et al., 62.

<sup>203</sup> Moncada et al., 67.

<sup>204</sup> Moncada et al., 62.

<sup>205</sup> Moncada et al., 68.

<sup>206</sup> Moncada et al., 62.

<sup>207</sup> Moncada et al., 68.

<sup>208</sup> Moncada et al., 63.

<sup>209</sup> Moncada et al., 69–70.

<sup>210</sup> Rui Alexandre Castanho et al., ‘Princípios de Planeamento Estratégico e Gestão de Turismo Rural em Territórios Ultraperiféricos: O Caso de Estudo do Arquipélago dos Açores’, *Revista Ibérica de Sistemas e Tecnologias de Informação* E36 (2020): 37.

“The general fall of tariff barriers along with the fall of transportation and telecommunication costs have modified the notion of time and distance while globalization has altered the traditional economic and political frame of island regions. Globalization brought competitors to local markets and opened a world of new opportunities that can be explored by peripheral and, in particular, island economies.”<sup>211</sup>

So how does contemporary Terceira fare with regards to the critical features outlined by Moncada et al.? I propose the following considerations.

As of 2022, the biggest impact in the transport sector is that of Low Cost carriers, examined by Luiz in her dissertation.<sup>212</sup> Introduced with the 2015 liberalization of the air traffic in the region, they had the immediate effect of lowering travel fares for non-residents and boosted the regional tourism industry.<sup>213</sup> In Terceira, Low Costs are active since 2017.<sup>214</sup> Meanwhile (2014–2018) the growth of local accommodation services [*alojamento local*]<sup>215</sup> soared 732%—that is, double the growth of the Autonomous Region. Hotels and the traditional hospitality industry rose only 22%; however, the sector saw a spike in employment rates, which could not be detected in local accommodation, given the latter does not create a proportional number of working opportunities.<sup>216</sup>

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<sup>211</sup> Francisco Camara, ‘Export and Social Networking as a Resource Control Strategy: A Case Study from the Azores’, *Journal of Small Business & Entrepreneurship* 19, no. 4 (December 2006): 396, <https://doi.org/10.1080/08276331.2006.10593379>.

<sup>212</sup> Annette da Fonseca Luiz, ‘Impactos Das Companhias Aéreas Low-Cost, No Desenvolvimento Socioeconómico Da Ilha Terceira: Um Estudo Empírico’ (Lisboa, Universidade Lusófona de Humanidades e Tecnologias, 2021), <http://hdl.handle.net/10437/12348>.

<sup>213</sup> Luiz, 48.

<sup>214</sup> Luiz, 117.

<sup>215</sup> *Alojamento local* is just one of the many categories of tourist accommodation recognized by Portugal. A steep growth in one accommodation type might not be mirrored by growth in others.

<sup>216</sup> Luiz, ‘Impactos Das Companhias Aéreas Low-Cost, No Desenvolvimento Socioeconómico Da Ilha Terceira: Um Estudo Empírico’, 119–120.

Faced with these striking figures, Luiz declares herself unable to show a direct causal link between the growth of the tourism industry and the advent of Low Cost carriers:<sup>217</sup> therefore, it might be the case that Low Cost carriers are a symptom of a booming tourism industry, but not the cause of it. Notwithstanding this, since tourism is based on transportation,<sup>218</sup> it could be argued that the soaring tourism industry in Terceira is evidence of better integration at a global level; however, the fact that even small improvements in the transportation system might have had such a great impact on economy speaks volume about the island's peripherality.

Further aspects of transportation involve the accessibility of maritime transport. Given inter-island distance and the in-between sea medium, transport systems do not resemble those of big continental regions.<sup>219</sup> Weather conditions affect the ability of carriers to operate with regularity.<sup>220</sup>

Concerning economic diversification, I could not find processed data concerning Terceira Island, such as an aggregate index that depicts the situation at the insular level. However, a series of clues suggest that Moncada et al.'s considerations apply to the island. In late 2021, a press release of the Government of the Azores announced the creation of a capitalization fund; among the stated goals was mentioned the increase of economic diversification—which is evidence this is perceived as an issue in the Autonomous Region.<sup>221</sup> Considering Gross Value Added (GVA) per sector (see *Table 6*), the Azores are akin to the European Union's

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<sup>217</sup> Luiz, 122.

<sup>218</sup> Mirjana Kovačić and Tamara Milošević, 'Interdependence of Transport and Tourism', *Journal of Maritime & Transportation Science* 52, no. 1 (November 2016): 99, <https://doi.org/10.18048/2016.52.06>.

<sup>219</sup> Pimentel et al., 'Maritime Transportation Dynamics in the Azores Region', 3.

<sup>220</sup> Pimentel et al., 3.

<sup>221</sup> Governo dos Açores, 'Governo Regional cria Fundo de Capitalização das Empresas dos Açores', Institutional website, *Governo dos Açores Website* (blog), 22 November 2021, <https://portal.azores.gov.pt/web/comunicacao/news-detail?id=5017654>.

average (EU27) in terms of construction industry, real estate, and cultural activities; they are similar to Portugal in terms of ICT industry, finance, and professional or scientific activities. The overrepresented sectors in Azorean economies are the primary sector (agriculture, forestry, and fishing) and the public sector—including welfare services. At bird’s view, if Portugal looks more like an industrial economy compared to the EU27’s post-industrial outlook, the Azores appear like a pre-industrial economy—yet with the benefits of advanced public expenditure, access to ICT, and a solid retail and service sector.

Activity type	Azores		Portugal		Azores vs. Portugal	EU27		Azores vs. EU27
	GVA 2019	GVA 2019 %	GVA 2019	GVA 2019 %		GVA 2019	GVA 2019 %	
Agriculture, forestry, and fishing	326.90	8.46	4,477.30	0.99	+++	223,085.30	1.53	++
Industry and manufacturing (no construction)	282.10	7.30	299,699.70	66.17	---	4,587,146.40	31.37	--
Construction	156.40	4.05	8,087.20	1.79	+	674,820.60	4.61	=
Wholesale and retail trade, transport, accommodation and food service	1,008.10	26.08	45,023.80	9.94	+	2,414,531.20	16.51	+
ICT	61.20	1.58	7,145.00	1.58	=	636,767.20	4.35	--
Financial and insurance	89.80	2.32	9,108.80	2.01	=	554,227.70	3.79	-
Real estate	506.80	13.11	23,207.00	5.12	+	1,356,818.40	9.28	=
Professional, scientific and technical activities	164.20	4.25	15,379.70	3.40	=	1,418,436.90	9.70	-
Public admin, defence, education, health and social work	1,131.40	29.27	35,384.00	7.81	++	2,338,810.20	15.99	+
Arts, entertainment, recreation; other services; household and extra-territorial organizations	138.60	3.59	5,438.00	1.20	++	419,444.00	2.87	=
Total	3,865.50	100.00	452,950.50	100.00		14,624,087.90	100.00	

Notes: Absolute figures are in million Euros; Eurostat data were available with an A11 profile: for comparison with SREA data, figures for industry (except construction) and for manufacturing have been added up.

Table 6: GVA per economic activity type and comparison (sources: Eurostat,<sup>222</sup> SREA<sup>223</sup>).

<sup>222</sup> Eurostat, ‘Gross Value Added and Income by A\*10 Industry Breakdowns’, 25 August 2022.

Terceiran public opinion does not approve of the gradual closure of the Lajes Field:

“Granted I DO think the abandonment of the base by the American military is a really, really bad idea given that Lajes is a important strategic location for mid-Atlantic force projection with large amounts of base housing and infrastructure that was created but a short time ago. The economic devastation that has resulted from the wind-down of the American military presence on the island is significant, and it has adversely impacted the lives of much of the population of Terceira Island. In fact, China has expressed a willingness to quickly assume control of the base should the United States abandon the facility wholesale--this would greatly expand the sphere of their influence.”<sup>224</sup>

This message is dated 13 February 2018 and was posted by an anonymous user with an American IP, who opened a thread belonging to the political image board (/pol/) of 4chan. As with other anonymous posts on the Internet, its analysis should not bear on the factual contents but on its ability to summarize an attitude towards the subject matter. In this case, the withdrawal of American forces from the island is described in apocalyptic terms (“economic devastation”) and as an undesirable situation (“a really, really bad idea”):

“Even though the facility is still currently operated by American forces, their presence is negligible and thus the people of the island who once relied on American servicemen to come to their markets and restaurants are now struggling to make ends meet.”<sup>225</sup>

These ideas should be taken *cum grano*, since most of the thread is dedicated to a conspiracy according to which a politician of Azorean descent might have leaked sensitive information to facilitate Russian activity in the Atlantic circa 2012–2013 in order to convince the United States to revise their decision to downwind their forces in Terceira.

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<sup>223</sup> SREA, ‘VAB segundo a classificação económica A10 - 1995/2019’, Contas Regionais 1995 e Anos Seguintes, 2019, <https://srea.azores.gov.pt/Conteudos/Media/file.aspx?ida=9259>.

<sup>224</sup> sxa0IX10, ‘160257412’, 4chan, 13 February 2018, <https://archive.4plebs.org/pol/thread/160257412/#q160257412>.

<sup>225</sup> sxa0IX10, ‘160257545’, 4chan, 13 February 2018, <https://archive.4plebs.org/pol/thread/160257412/#q160257545>.

## 5. Mythopoesis: the legend of Brianda Pereira

Globalizing, internationalizing, and complementary localizing processes have had an impact on the identity of Terceiran people. During fieldwork, informants used to recall with pleasure the times of intensive American presence on the island. This could be because of the median age of the people I interviewed, since such period coincided with their youth; but calling it an age-induced bias would diminish the value they attach to their memories, to which—ethnographically speaking—it is epistemically sound to pay credit.<sup>1</sup> Notwithstanding realistic criticism of American hegemony on the geopolitical board, during the first rapid assessment I carried out, informants' recounts are best summarized with the following statement: “We matter.” That is, “we count, we are relevant.”

It would be tempting to interpret this as some sort of inferiority complex, which manifests itself with reference to the Lajes Field. However, this is far from being the case: history shows that Terceira Island mattered at several times in Portuguese and world history. Thus, I collected some of the most common *topoi* on Terceira's relevance, which have sound historical basis. This is not an attempt to reconstruct in detail the history of Terceira but to highlight those narratives that are most often thrown around in everyday conversations. Some narratives of relevance focus on Terceira, whereas other ones focus on Azores in general.

### 5.1. A (female) stronghold of Portuguese identity

On January 23, 2022, an anonymous user with the randomly attributed ID ‘5GRFEdmn’ posted the following lines on the /pol/ ‘political’ board of the (in)famous website called 4chan:

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<sup>1</sup> Compare with Finkelstein, *The Archive of Loss*, 92.



“I would [go under the knee of the Spanish],<sup>2</sup> nothing to lose more to gain. Share resources both land and sea, become the nation of Iberia, would be great. And I’m from Terceira island, we were the only ones to fight back spaniards when they tried to conquer Portugal. Past is past, we should aim for a better future, our country is fucked with all it’s corruption.”<sup>3</sup>

Anonymous image boards allow users to fake their identities and pretend to be whoever they want to—including supporting ideas that they would not uphold in public. Notwithstanding such caveat, there is a likelihood 5GRFEdmn is indeed Portuguese and does not speak ironically. I maintain that reference to Terceira is too rare and too contextualized to suggest an attempt at misleading the readers.

This take on a union between Spain and Portugal introduces a *topos* of contemporary discourse on Terceira, which concerns the role played by the island in preserving the Portuguese polity. This is the reason why fieldwork informants considered Terceira to be the poster girl of historical continuity for Portuguese people. To understand this part of the discourse, it is necessary illustrate some historical events.

### 5.1.1. Succession crisis (1580)

The first node is the 1580 succession crisis. In 1578, King Sebastião I died with no heir in the Battle of Alcácer Quibir (now: Ksar el-Kebir, Morocco), and Henrique I, ‘the Cardinal-King,’ succeeded him at the helm of Portugal.<sup>4</sup> Henrique I came from an ecclesiastical career and

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<sup>2</sup> 4chan’s /pol/ board is notorious for hosting radical right-wing narratives. The reference to being ‘under someone’s knee,’ which is present throughout the board’s thread is not just a geopolitical metaphor, but an explicit allegory based on the killing of George Floyd, which suffocated under the knee of the police officer Derek Chauvin. In nowadays’ Internet narratives, knees have replaced boots as the metaphor for police brutality and fascism.

<sup>3</sup> 5GRFEdmn, ‘357822631’, 4chan, 23 January 2022, <https://archive.4plebs.org/pol/thread/357794897/#q357822631>.

<sup>4</sup> Maria do Rosário Themudo Barata, ‘Portugal e a Europa na Época Moderna’, in *História de Portugal*, ed. José Tengarrinha (São Paulo & Lisboa: Instituto Camões, Fundação editora da UNESP, EDUSC, 2000), 114–115.

used to be a Catholic Cardinal before his appointment to the throne:<sup>5</sup> as such, he was not allowed to have legitimate heirs<sup>6</sup>—hence the nickname ‘the Chaste [*o Casto*].’<sup>7</sup> His untimely passing in 1580 led to a succession crisis, which was exploited by Felipe II of Spain, who conquered Lisbon and claimed the crown for himself.<sup>8</sup> In the aftermath of Felipe II’s military blitz, three factions emerged: a pro-Spanish one, led by the Council of Regents; a first Portuguese faction, led by the Duchess of Bragança, who was the closest relative of Henrique I in terms of royal lineage; and another Portuguese faction, which supported António (known as *Prior do Crato*), who was a minor candidate of the Joanine Dynasty and a veteran of the late Sebastião I’s North African campaign.<sup>9</sup>

António received popular support thanks to the uprisings of Santarém, Lisbon, and Setúbal, but his troops were crushed in the Battle of Alcântara by the Duke of Alba—commander of the Spanish forces. As António fled to foreign lands, hoping to win the support of other European monarchs,<sup>10</sup> the Spaniards tried to get hold of the Azores, where several loyalists had sought refuge. The clash between Spanish invaders and Portuguese defenders reached its apex in Terceira Island with the Battle of Salga (July 15, 1581), which resulted in the defeat of the Spanish forces.<sup>11</sup> This paved the way for António’s arrival later that year.<sup>12</sup> As he ruled

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<sup>5</sup> Barata, 114–115.

<sup>6</sup> José Pedro Paiva, ‘Bishops and Politics: The Portuguese Episcopacy During the Dynastic Crisis of 1580’, *E-Journal of Portuguese History* 4, no. 2 (2006): 4.

<sup>7</sup> Dian Fox, ‘From King Sebastian of Portugal to Miguel de Cervantes and Don Quijote: A Genealogy of Myth and Influence’, *MLN* 135, no. 2 (2020): 389, <https://doi.org/10.1353/mln.2020.0030>.

<sup>8</sup> Paiva, ‘Bishops and Politics: The Portuguese Episcopacy During the Dynastic Crisis of 1580’, 4–5.

<sup>9</sup> Barata, ‘Portugal e a Europa na Época Moderna’, 114–115.

<sup>10</sup> Enes, ‘A Resistência Popular Terceirense a Filipe II’, 158.

<sup>11</sup> José Damião Rodrigues, ‘The Flight of the Eagle: An Island Tribute to the Universal Iberian Monarchy at the End of the Sixteenth Century’, 2011, 16, <https://doi.org/10.26300/JE0R-EQ85>.

over the island, he minted his own coins<sup>13</sup> and ordered the reinforcement of the island's "scant" defences—especially in Monte Brasil, which would be further fortified by later rulers.<sup>14</sup>

António was eventually defeated as a result of the Spanish expedition of 1583.<sup>15</sup> The early-Twentieth Century historian Cotarelo notices Miguel de Cervantes participated this Spanish campaign against Portugal.<sup>16</sup> This information is likely borrowed from another historian active in the early Nineteenth Century, Fernandez de Navarrete, who infers the presence of Cervantes in Terceira from the following facts: his regiment (Tercio de Figueroa) participated in an assault against Angra do Heroísmo; later, his brother Rodrigo de Cervantes got a distinction because of his bravery in that action; additionally, in a document addressed to Felipe II and dated May 21, 1590 (7 years later), Miguel de Cervantes himself mentioned being in Terceira immediately after his release from captivity (ended circa 1580).<sup>17</sup>

All of the above resistance that took place in Terceira did not prevent the establishment of a Habsburg monarchy, which translated into a personal union between Spain and Portugal. However, such events became embedded in a narrative of resistance, which is still reflected

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<sup>12</sup> Federico Palomo, 'Para el sosiego y quietud del reino. En torno a Felipe II y el poder eclesiástico en el Portugal de finales del siglo XVI', *Hispania* 64, no. 216 (30 April 2004): 72, <https://doi.org/10.3989/hispania.2004.v64.i216.197>.

<sup>13</sup> Augusto Carlos Teixeira de Aragão, *Descrição geral e histórica das moedas cunhadas em nome dos reis, regentes e governadores de Portugal, Tomo II* (Lisboa: Imprensa Nacional, 1877), 271.

<sup>14</sup> Nestor de Sousa, 'Programas de Arquitectura Militar Quinhentista em Ponta Delgada e Angra do Heroísmo: Italianos, Italianização e Intervenções até ao Século XVIII', *ARQUIPÉLAGO. História*, 2, 6 (2002): 86, <http://hdl.handle.net/10400.3/369>.

<sup>15</sup> Rodríguez Hernández, 'The Spanish Imperial Wars of the 16th Century', 271.

<sup>16</sup> Emilio Cotarelo y Mori, *Los puntos oscuros en la vida de Cervantes* (Madrid: Tipografía de la Revista de Archivos, Bibliotecas y Museos, 1916), 25–26, <https://archive.org/details/lospuntosobscuro00cota/page/2/mode/2up>.

<sup>17</sup> Martín Fernández de Navarrete, *Vida de Miguel de Cervantes Saavedra* (Madrid: La Real Academia Española, 1819), 388–390, <https://archive.org/details/vidademigueldec01navagoog/mode/2up>.

in some of the informants' interviews, whose testimony was collected during early fieldwork. Whereas the participation of historical figures such as Cervantes to military action in Terceira is known only to those with a high level of formal education, generally speaking, the 'stronghold' character of Terceira standing against foreign (Spanish) attacks is one of the trading cards that gets thrown around when natives describe the island.

### 5.1.2. *Brianda: the legend*

But the legend is not limited to a generic account of Terceira's resistance. As every legend, it has its heroes. The Battle of Salga is remembered because of the engaging nature of the story and its link to Terceira's economy. Accordingly, during the earliest Spanish attempts to land in the island, a local woman called Brianda Pereira improvised a defence by arming other men and women. The episode was popularised by Gervásio Lima in a 1925 booklet entitled *A Batalha da Salga*.<sup>18</sup> This is a summary provided by Lima in his later *A Patria Açoreana* (1928), which contains approximately the same version of the story:

“Notwithstanding her sex, she armed herself and invited men and women to fight, whom, through her example, she encouraged to defend the homeland from Castilian domination, and succeeded. It took place there, in the expanse of the Salga valley, on Terceira Island, in 1581, when the soldiers of Philip II of Castile invaded the land to obtain the surrender of a people that remained firm in the oath of allegiance to the Portuguese king repelling the invasion. Brianda Pereira, wife of the farmer Bartolomeu Lourenço, distributes darts and pikes to servants and neighbours of both sexes, and manages to hinder the advance of a thousand Spaniards who, under the command of Dom Pedro Valdez, were marching inland. The women threw themselves at such dangers, [to the point] that it was necessary to gather them in the chapel of S. João, shutting them in to prevent the reckless outrage in which they were involving themselves in the fight against the Castilians, putting their lives at risk for the defence of the national integrity and independence. And the patriotic and daring meddling of Brianda Pereira effectively influenced the triumph of the struggle, leaving the island

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<sup>18</sup> Gervásio da Silva Lima, *A batalha da Salga na Terceira em 25 de julho de 1581* (Angra do Heroísmo: Tip. Editora Açoreana de Manuel de Freitas Mariano, 1925). See also: José Noronha Bretão, *As Danças do Entrudo. Uma Festa do Povo: Teatro Popular da Ilha Terceira. 1.º Volume* (Angra do Heroísmo (PT): Direcção Regional da Cultura, 1998), 209.

of Terceira the only holder of the flag of the fivers,<sup>19</sup> which was preserved for two years during the short-lived reign of Dom António Prior do Crato. As for the thousand men of Dom Pedro Valdez, we had them being swallowed by the inlets and ditches of the sea shore, and we buried them in the foaming waves of Porto Judeu.”<sup>20</sup>

Lima’s retelling of the story matches some main topics that were dear to the sensitivity of early-Twentieth Century Portuguese historians: the battle is cast as a national fight for freedom; the text is imbued with a feeling of romantic nostalgia for those ‘good old days’ in which Terceira Island was making a stand against the Spaniards; eventually, this becomes a tale of commoners fighting against a professional army, and winning thanks to their wits and bravery. Brianda became the emblem of Terceira Island’s resistance. The Terceirense José Nunes Valdão, from Caldeira de Vila Nova, wrote the following *fado* on March 3, 1947:

“Beautiful Brianda Pereira  
Heroine of Terceira  
Your name is immortal  
You were a heroine in Salga  
A side of the noble country  
To rescue Portugal.  
  
She screamed in a shrill voice  
For everyone to help her  
To save the flag  
Because her only clay  
And the symbol of the Nation  
Was the heroic Terceira.  
  
And the bells ringing  
To make soldiers march  
Against the warriors of Spain  
[Everyone] ran from all sides  
Towards where Brianda stood  
With a daring bravery.

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<sup>19</sup> Still preserved in contemporary Portuguese flag, the ‘fivers [*quinas*]’ are located in the middle of the emblem: five blue shields, each of them sporting five white spots. They symbolise the defeat of five “Moorish” kings by the Portuguese king Dom Afonso Henrique in the battle of Ourique (1139). See Isabel de Barros Dias, ‘In hoc signo...’, in *Des(a)fiando Discursos: Homenagem a Maria Emília ricardo Marques*, ed. Dulce Carvalho (Universidade Aberta, 2005), n. 17.

<sup>20</sup> Gervásio da Silva Lima, *A Patria Açoreana* (Angra do Heroísmo: Tip. Editora Açoreana de Manuel de Freitas Mariano, 1928), 109–110.

Ciprião de Figueiredo  
 Who fearlessly fought  
 [with] Brainda and other heroes  
 They threw themselves with such strength  
 That they almost killed all  
 Of the thousand Spaniards  
  
 The Castilian flag  
 Is at the foot of the Lusitanian one  
 That still shines on the fortresses  
 So that [all] could see the heroism  
 And the great patriotism  
 By the people of the island”<sup>21</sup>

Compare with the most ancient available historical account of Brianda. It could be found in a chronicle by an anonymous author: *Relação das coisas que aconteceram em a cidade de Angra, ilha Terceira, depois que se perdeu el rei D. Sebastião em Africa* (1611).<sup>22</sup> According to Torres, who edited the work in the Nineteenth Century for a journal of literary and scientific dissemination—*O Panorama*<sup>23</sup>—the Anonymous of the *Relação* was a citizen of Angra.<sup>24</sup> Unfortunately, as Torres explains, the only extant copy of the report is a transcript (apograph) by Nicolau de Freitas de Figueiredo (1665):<sup>25</sup> the original had been seemingly preserved thanks to the efforts of Diogo das Chagas,<sup>26</sup> a Franciscan monk (1584?–1661?).<sup>27</sup>

This is the episode described by the Anonymous:

“Not only the Castilians had better ground, but the caravel, which was armed with big calibres, close to the coast, and tacking with the Northern wind, kept shooting at the people on the land. And the Castilian soldiers, seeing so many people already, and because they were unbound and fighting at their own leisure, and the wheat was to be

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<sup>21</sup> José Noronha Bretão, *As Danças do Entrudo. Uma Festa do Povo: Teatro Popular da Ilha Terceira. 2.º Volume* (Angra do Heroísmo (PT): Direcção Regional da Cultura, 2001), 162.

<sup>22</sup> Enes, ‘A Resistência Popular Terceirense a Filipe II’, n. 24.

<sup>23</sup> Benedita de Cássia Lima Sant’Anna, ‘O Panorama (1837-1868): história de um Jornal’, *Patrimônio e Memória* 4, no. 2 (2009): 236–54.

<sup>24</sup> José de Torres, ‘Memórias históricas (1578–1583)’, *O Panorama* 13 (1856): 159.

<sup>25</sup> Torres.

<sup>26</sup> Torres.

<sup>27</sup> Artur Teodoro de Matos and Frei Diogo das Chagas, ‘Prefácio’, in *Espelho Cristalino em Jardim de Várias Flores* (Angra do Heroísmo: Secretaria Regional da Educação e Cultura, 1989).

harvested and was hindering them, they set fire to many, and the wheat was in bundles on Bartholomeu Lourenço's threshing floor.<sup>28</sup> And they would cry loudly from below: 'Damn Portuguese, let it go, because today you are such bastards.' This angered the Portuguese and drove them to battle more willingly. When the poor woman, named Angela Pereira, saw her crockery and her threshing-floor bundles burning, and her husband captive and wounded, and her house and farm in the hands of the soldiers, she escaped in a hurry in her skirt, she looked like a mad, and with the last words that she had, she encouraged the Portuguese to fight better, and would guide them because she wanted back her house. And because she was a young woman, noble and good-looking, and a very gallant woman, with no doubt her honour and life would have been sufficient for resisting. And they took her with other women up to some church of São João. There were women with weapons in their hands, who were not fighting far from their husbands, and others who had no husbands. At midday, they say, Dom Pedro de Valdez, seeing so many people, and the fervour with which they fought and defended themselves, turned to withdraw to the fleet."<sup>29</sup>

The most striking difference between this 1611 account and the story retold by Lima is the motive behind Angela (later: Brianda) Pereira is only loosely patriotic and has more to do with the loss of her husband, dwelling, and crops. This does not subtract from the fact women were fighting gallantly and fiercely, according to the Anonymous.

Conversely, the idea that they got rounded up by the church to prevent them from fighting appears to be just a sexist interpretation by Lima.<sup>30</sup> Another notorious distortion of the events is due to Francisco Ferreira Drummond (1796–1858), author of the *Anais da Ilha Terceira*. In his chronicle, he claims that the Spanish interest for her house was possibly due to her beauty.

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<sup>28</sup> A threshing floor is an area of flattened ground (usually circular) where harvested crops would be laid down for threshing.

<sup>29</sup> Anonymous, 'Relação das coisas que aconteceram em a cidade de Angra, ilha Terceira, depois que se perdeu el rei D. Sebastião em Africa [parte I]', ed. José de Torres, *O Panorama* 13 (1856): 250.

<sup>30</sup> The original Portuguese text by the Anonymous displays heavy use of parataxis, with explicit subjects removed from the verbs. The original reads: "*E a fizeram recolher com outras mulheres a cima a uma igreja de S. João.*" Literally: "And they made her gather with other women on higher ground by some church of S. João." The plural subject ("they") is implicit in the verb, but it is not clear whom the agentive function refers to. Most likely, those who were directing the counter-offensive had organized a rendezvous by said church. This does not excuse Lima's interpretation, which still seems gratuitous. See Anonymous, 250.

This contradicts his source, that is, the 1611 Anonymous, which mentioned her beauty but attributed her involvement to her properties and social standing.

The legend of Brianda Pereira is often conflated with another episode of the same battle, in which the islanders unleashed a herd of cattle against the Spanish invaders,<sup>31</sup> who were seemingly running uphill to gain a vantage point; accordingly, the stampede routed the enemy forces.<sup>32</sup>

This legend could be classified as one of the many cases of folklore-making that results in a tale of resistance during a siege. The narrative structure of such tales is simple and usually involves a main character who does not belong to the ‘warrior class’ and a series of ingenious ploys that lead to victory. Drawing on the David-versus-Goliath metaphor, it is concerned with the social cohesion sieges bring about. In fact, as Dowdall and Horne explain, more than field battles, sieges are typical warfare situations in which an entire population is involved in a defensive effort.<sup>33</sup> What makes these stories interesting for the audience is that they tell the tale of ordinary people doing extraordinary things—a theme that Lee Baskin shows was already popular in Sixteenth-century European theatre.<sup>34</sup>

### 5.1.3. *Fighting women*

This is one of the reasons why, in traditional European folklore, the main character of such stories is usually a woman: women were usually treated as non-combatants and embodied the

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<sup>31</sup> Enes, ‘A Resistência Popular Terceirense a Filipe II’, 167.

<sup>32</sup> Lima, *A batalha da Salga na Terceira em 25 de julho de 1581*, 36–37.

<sup>33</sup> Alex Dowdall and John Horne, eds., *Civilians under Siege from Sarajevo to Troy* (Berlin, Heidelberg, and New York: Springer, 2018).

<sup>34</sup> Richard Lee Baskin, ‘Figuring the Commoner -Hero on the English Stage, 1588–1600’ (Knoxville, University of Tennessee, 2000).



cliché image of vulnerability and passivity.<sup>35</sup> Brianda is one among the many—the epitome of the category being Joan of Arc during the Siege of Orléans (1428–1429).<sup>36</sup> To name a few: Dina and Clarenza, Siege of Messina (1282);<sup>37</sup> Jeanne Hachette, Siege of Beauvais (1472); Kenau Simonsdochter Hasselaer and Maria van Schooten during the Siege of Haarlem (1573);<sup>38</sup> Casta Álvarez, Siege of Zaragoza (1808);<sup>39</sup> Highland Jessie, Siege of Lucknow (1857).<sup>40</sup>

For some of them—such as Kenau Simonsdochter Hasselaer<sup>41</sup>—we have a plenitude of primary sources. Others—such as Joan of Arc—have undergone several cycles of mythization and historicization.<sup>42</sup> Some legends are unverifiable owing to lack of reliable historical sources: for example, according to Di Giovanni, the legend of Dina and Clarenza is grounded on a swift mention by the pseudo-Nicolao de Specialis<sup>43</sup> who, in his *Historia Sicula* (1337–1342?),<sup>44</sup> recounts the role played by family members in fending off the besieging

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<sup>35</sup> Min Ji Kang, ‘In Vino Veritas: Wine, Sex, and Gender Relations in Late Medieval and Early Modern Spanish Literature’ (West Lafayette, Indiana, Purdue University, 2019), 18–20.

<sup>36</sup> Dietmar Rieger, ‘Geschichte und Geschichtsmythos: Einige Überlegungen am Beispiel der Jungfrau von Orléans’, in *Mythosaktualisierungen*, ed. Stephanie Wodianka and Dietmar Rieger (Berlin, Boston: DE GRUYTER, 2006), <https://doi.org/10.1515/9783110921892.17>.

<sup>37</sup> Vincenzo Di Giovanni, *Filologia e letteratura siciliana*, vol. 2 (Palermo: L. Pedone Lauriel Editore, 1871), 85–86, [https://archive.org/details/bub\\_gb\\_g4FLAAAcAAJ/mode/2up](https://archive.org/details/bub_gb_g4FLAAAcAAJ/mode/2up).

<sup>38</sup> Elis Kloek, *Kenau: de heldhaftige zakenvrouw uit Haarlem (1526-1588)*, Verloren Verleden (Hilversum: Verloren, 2001).

<sup>39</sup> Elena Fernández García, ‘Transgresión total y transgresión parcial en las defensoras de la patria’, *Mélanges de la Casa de Velázquez*, no. 38–1 (15 April 2008): 135–54, <https://doi.org/10.4000/mcv.987>.

<sup>40</sup> Brian Wallace, ‘“All England Was Present at That Siege”: Imperial Defences and Island Stories in British Culture’, *History Workshop Journal* 93, no. 1 (28 May 2022): 165, <https://doi.org/10.1093/hwj/dbac005>.

<sup>41</sup> Kloek, *Kenau: de heldhaftige zakenvrouw uit Haarlem (1526-1588)*; Christine Kooi, ‘Kenau, De Heldhaftige Zakenvrouw Uit Haarlem (1526-1588) (Verloren Verleden 15)’, *The Sixteenth Century Journal* 34, no. 1 (1 April 2003): 289, <https://doi.org/10.2307/20061400>.

<sup>42</sup> Rieger, ‘Geschichte und Geschichtsmythos’, 19.

<sup>43</sup> Di Giovanni, *Filologia e letteratura siciliana*, 2:85–86.

<sup>44</sup> Marino Zabbia, ‘SPECIALE, Nicolò’, in *Dizionario Biografico degli Italiani* (Roma: Istituto della Enciclopedia italiana, 2018).

forces in Messina.<sup>45</sup> Finally, some tales—like that of Highland Jessie—have been debunked.<sup>46</sup>

In the folklore of Terceira, Brianda Pereira is set side by side with Violante do Canto. The latter belonged to one of the most powerful Azorean families of the Sixteenth Century and supported the Terceiran resistance against Felipe II of Spain, possibly with a public allegiance to the claimant António Prior do Crato.<sup>47</sup> As a consequence, she was punished and deprived of part of her properties after the Spanish victory.<sup>48</sup>

Historically speaking, the figure of Violante do Canto is riddled with ambiguities. Gregório, who reconstructed her life in detail, lists them: on the one hand, she was subject to a tutor (which she would later sue) and denied recognition of adulthood because she was unmarried; on the other hand, she had a say in the management of her estate and the people were devoted to her and saw her as a point of reference.<sup>49</sup>

#### *5.1.4. Women in Terceira's intellectual discourse*

In her dissertation, Amaral examines the narratives concerning Azorean women, and remarks that their stories were being retold and reworked according to the sensitivity of contemporary age.<sup>50</sup> On the one hand, she remarks, female characters are instrumental to the re-working of

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<sup>45</sup> Nicolao de Specialis, 'Chronicon Siciliae Auctore Anonymo Conscriptum Ab Anno circiter DCCCXX usque ad Ann. MCCCXXVIII', in *Rerum Italicarum Scriptores Tomus Decimus*, ed. Edmond Martène and Ursin Durand, vol. 10, *Rerum Italicarum Scriptores* (Milan, 1727), 934, <https://archive.org/details/RerumItalicarumScriptores10/mode/2up>.

<sup>46</sup> Wallace, "'All England Was Present at That Siege'", 165–166.

<sup>47</sup> Rute Dias Gregório, 'Violante do Canto: Vislumbres da mulher e do seu património', in *Violante: 450 anos do nascimento de D. Violante do Canto: comunicações do colóquio, outubro de 2006*, ed. José Damião Rodrigues (*Violante: 450 anos do nascimento de D. Violante do Canto*, Angra do Heroísmo: Centro de Conhecimento dos Açores, 2007), 53.

<sup>48</sup> Gregório, 53.

<sup>49</sup> Gregório, 54–55.

<sup>50</sup> Irene Amaral, 'A emergência da mulher: Uma revisão do conceito de Açorianidade' (Dartmouth, University of Massachusetts Dartmouth, 2011); Irene de Amaral, *A emergência*

the concept of *Açorianidade*; on the other hand, however, their presence is evidence of an increased interest in the role of women in Azorean history.<sup>51</sup>

Amaral identifies three stages in the rise of women as the subjects-objects of Azorean discourse.<sup>52</sup> The first stage pertains to the Nineteenth Century and treats Azorean women as an intellectual curiosity—either because of ethnographic or touristic interest.<sup>53</sup> The second stage covers the 1930s and 1940s and mixes the internationalization of Portuguese (and Azorean) intellectuals with the patriarchal project of the rising *Estado Novo*.<sup>54</sup> Finally, in the second half of the Twentieth Century, the third stage sees the appearance of contradictions between attempts to ‘recruit’ female characters to redraw the narrative on *Açorianidade* and the active resistance of those women who are ready to oppose instrumentalization.<sup>55</sup>

In the *Corographia açórica*, women are treated as a group and celebrated for their reproductive abilities and their competence in the household. This is functional—says Amaral—to the then-widespread myth of the ‘good savage:’ allegedly, Azores distance from the mainland and lack of an industrial economy worked in favour of the intellectual’s confirmation bias, since they were in search of pristine regions of the Earth where they believed they could find examples of mankind’s ‘original’ character.<sup>56</sup>

However, even at the dawn of the Twentieth Century—much like the aforementioned stress on historical tales of defence against foreign invaders—such discourse remains centred on Portugal rather than the archipelago. For an enlightened early-Twentieth Century

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*da mulher: re-visões literárias sobre a açorianidade*, 1.a edição, Compendium (Lisboa: Chiado editora, 2014).

<sup>51</sup> Amaral, ‘A emergência da mulher: Uma revisão do conceito de Açorianidade’, iii–iv.

<sup>52</sup> Amaral, 6–7.

<sup>53</sup> Amaral, 6.

<sup>54</sup> Amaral, 6.

<sup>55</sup> Amaral, 7.

<sup>56</sup> Amaral, 14–15.

conservative like Ribeiro, Azores represented the cradle of *Portuguese* continuity: a land of uncorrupted Portuguese people, who never enjoyed the wealth of colonialism and, as such, managed to retain the moral character of their ancestors.<sup>57</sup> In this perspective, defence amounts to preservation: that is, not a matter of warfare but an issue of retention of cultural values.

## 5.2. The *mise-en-scène* of the legend

Given the relevance in Terceiran history of the Battle of Salga and its surrounding legends, it made a perfect topic for theatrical representation—and particularly in the *danças de dia* [daytime dances] of Carnival [*Entrudo*], which customarily represented tragic or historical events. This is a summary by Bretão of the theatrical and musical pieces concerning Brianda Pereira:

“The topic of Brianda Pereira [...] was widely used by Terceiran popular poets in the composition of plots for *Danças de Entrudo*. I know [...] at least three texts: one that came out in 1936, from Altares, in quatrains (likely by Francisco Gonçalves Duarte); another one, dated 1947, [entitled] *Fado da Brianda Pereira*, authored by José Nunes Valadão, from Caldeira da Vila Nova, but which was never published; [third,] *Brianda Pereira*, from Corpo Santo, in sestets and quatrains, which was published in 1948.”<sup>58</sup>

Bretão proceeds to publish an adaptation of the latter by “Alberto Machado Toste (Alberto Brasileiro) with the collaboration of Francesco Pereira Simas (Loiro),” which was published, says Bretão, “in 1954.”<sup>59</sup>

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<sup>57</sup> Amaral, 16.

<sup>58</sup> Bretão, *As Danças do Entrudo. Uma Festa do Povo: Teatro Popular da Ilha Terceira. 1.º Volume*, 208.

<sup>59</sup> Bretão, 208.

### 5.2.1. *Brianda in 1954*

The musical play follows the traditional scheme of the *danças da Espada*. At the outset, the *mestre* (António Rocha Dutra, known by the namesake of Tony Queimado) greets all the audience pleading them, no matter their social class, to listen to his story and to excuse him for the “mash up”.<sup>60</sup> Then he states the *assunto* [subject], which is the Battle of Salga, and the *eneredo* [plot] begins.

July 5, 1581: a watchman on the Spanish ship catches sight of Terceira Island from the distance and his commander remarks the smartness of its people.<sup>61</sup> Meanwhile, the sentinels on the fortifications of the island notice the incoming fleet.<sup>62</sup> The Spanish commander (later identified as the Duke of Alba) explains that the island is torn between two factions: one in favour of António and another one in favour of the Spanish rulers—unfortunately for the Spaniards, the latter faction is the smallest and one of its leaders, João Bettencor, had just been decapitated because of his unwise public allegiance to Felipe of Castile.<sup>63</sup>

In-between, two different choirs alternate themselves on the stage: the Portuguese choir and the Spanish one.<sup>64</sup> These are likely to be the two wings of dancers, with different costumes depending on the side they are taking on the stage.<sup>65</sup> The Spanish choir expresses itself with threats but takes a chance to sing the praise of Terceira, because its wealth and beauty is

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<sup>60</sup> Bretão, 210.

<sup>61</sup> Bretão, 210.

<sup>62</sup> Bretão, 212.

<sup>63</sup> Bretão, 212.

<sup>64</sup> Bretão, 212.

<sup>65</sup> As it will be made clear in *Chapter 6*, the two wings began as the necessary arrangement for a marching crew meant to take the streets.

partly the reason for the conquest attempt.<sup>66</sup> Ciprião, the Portuguese commander, realizes the Spanish threat and invites the islanders to join him in the deadly fight.<sup>67</sup>

At this point of the play, the islanders are already identified as heroic and united people, who would do anything to save their homeland. As his troops are approaching, the Spanish commander recaps the events leading to the Battle of Salga: Felipe II had claimed the crown of Portugal and had already got hold of the continent, but Ciprião refused to submit to his rule and allegedly wrote a letter to the Spanish king declaring his allegiance to António—a letter which the Spanish commander reads aloud.<sup>68</sup> Commoners gather on the Portuguese side and confirm to the audience the truth of story told by the Spanish commander; then, they recap the events concerning António’s predecessor, the Cardinal King, and explain that the island had no fleet to defend it because its admiral, Diogo Dias, was forced to retreat.<sup>69</sup> Meanwhile, the Portuguese choir and the Spanish one keep exchanging tercets, which form whole sextuplets. The Portuguese decry the malicious attitude of the Spaniards, and the Spaniards respond with irony:

*“Choir [Portuguese]*  
Felipe rules in Portugal  
But the deadly confrontation  
Will be in Terceira  
  
*Spaniards*  
We will not wage war  
Because in this land  
There are welcoming people”<sup>70</sup>

The choir of commoners informs the audience that the people of Terceira rejected the Castilian envoys and got news, from a French ship, that António was safely harboured in

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<sup>66</sup> Bretão, *As Danças do Entrudo. Uma Festa do Povo: Teatro Popular da Ilha Terceira. 1.º Volume*, 212.

<sup>67</sup> Bretão, 212.

<sup>68</sup> Bretão, 213.

<sup>69</sup> Bretão, 213–214.

<sup>70</sup> Bretão, 214.

France.<sup>71</sup> These news trigger celebrations all over the island.<sup>72</sup> Afterwards, the islanders are informed that the two Eastern islands (São Miguel and Santa Maria) have cowardly yielded to Spanish rule.<sup>73</sup>

The Spanish fleet steers towards Porto Judeu and for twenty days the islanders wait for an attack, which eventually comes on July, 25,<sup>74</sup> when the Duke of Alba tries to test the Portuguese defences with a force of 250 men-at-arms.<sup>75</sup> In response, Ciprião summons his commanders and rushes towards the valley of Salga, to prevent the enemy from consolidating their positions.<sup>76</sup> The subsequent actions are sung by the watchman of Ponta dos Coelhos, who enjoys a view of the battlefield: the Spanish forces count 500 men, and the islanders—who are less than half a hundred—start a guerrilla warfare by shooting through the thick vegetation and by setting the crops on fire, to the point the Duke of Alba makes remarks about their fierce resistance.<sup>77</sup> Once the action approaches the house of Brianda Pereira, she enters the scene:

*“Sentinel of Ponta dos coelhos*  
The troop follows from the threshing floor  
To the house of Brianda Pereira  
To commit abuse and cowardly acts  
[She is] an honest woman, not immodest  
God gave her hope and light  
To defend herself from tyranny

*Brianda*  
They want to take away my dignity  
With injustice and cruelty  
I send to God my prayer  
So that [He could] give me strength  
And I could one day

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<sup>71</sup> Bretão, 214.

<sup>72</sup> Bretão, 214.

<sup>73</sup> Bretão, 214–215.

<sup>74</sup> Bretão, 215.

<sup>75</sup> Bretão, 215.

<sup>76</sup> Bretão, 216.

<sup>77</sup> Bretão, 216–217.

Take revenge for this theft  
[...]  
Let us go fight  
United 'till we die  
Asking God to help us  
Young women and the elders  
Stand by my guide  
And let us run with such spite”<sup>78</sup>

A scene follows in which Ciprião comes back exhausted from the fighting, and Frair Pedro St. Augustine, who stood on the side for most of the play, suggests him to gather “*gado bravo* [wild cattle]” from the nearby fields.<sup>79</sup> *Gado bravo* could be any type of bovine cattle, but it usually means bulls trained for bullfights.<sup>80</sup> Some time later, a *pastor* [herdsman] comes by *Ponta dos coelhos* where the sentinel is mounting guard, and the latter asks him details about the cattle. The herdsman replies:

“The strong Brianda Pereira  
The most Heroic woman of Terceira  
Seeing that that everything was in danger  
With men and women armed by her  
Interrupted in this fashion  
The passage of the enemy”<sup>81</sup>

At this, the sentinel remarks:

“There are even women in this war  
This land enjoys great patriotism  
On behalf of everyone  
And even if the Spaniards  
Aren't such heroes  
But the strength is unequal”<sup>82</sup>

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<sup>78</sup> Bretão, 217.

<sup>79</sup> Bretão, 218.

<sup>80</sup> See, e.g., Yara Patrícia Gomes de Pina Zau, ‘Perspetiva da sociedade portuguesa relativamente ao espetáculo tauromáquico’ (Lisboa, Universidade Lusófona de Humanidades e Tecnologias, 2017).

<sup>81</sup> Bretão, *As Danças do Entrudo. Uma Festa do Povo: Teatro Popular da Ilha Terceira. 1.º Volume*, 218.

<sup>82</sup> Bretão, 218.



The *pastor* then proceeds to collect the *gado* from all over the neighbourhood.<sup>83</sup>

Subsequently, the sentinel witnesses how the wild cattle's stampede tramples the enemies.<sup>84</sup>

It is then time for Brianda to speak up: she comments that the Battle of the Salga is a revenge for Alcácer Quíbir.<sup>85</sup> The number of Spanish participants to the action has risen to a thousand, and this allows one of the actors on the side to notice that all but fifty had deceased, which is a striking victory—he says—compared to the only thirty Portuguese lives lost in the battle.<sup>86</sup>

In the final stages of the play, some names are metaphorically set in stone for the years to come. First, Friar Pedro outlines the epic etymology of the island: originally baptized “*Ilha de Jesus Cristo*,” it is called “*Terceira*” because it is the third one that was discovered, but it has demonstrated to be the first one [*primeira*] in terms of heroism and wits.<sup>87</sup> Second, Friar Pedro and Ciprião sing the praises of Brianda Pereira and place her side by side with—if not even on top of—Brites de Almeida, a baker that is fabled to have cooked Castilian troops in her oven when she found they had hidden there during the aftermath of the battle of Aljubarrota (1385):

“*Friar Pedro*

[...]

In Aljubarrota there is a great (she-)baker

But like Brianda Pereira

Nobody heard of a woman like that

With the most amazing brilliance

Kept [alive] the heroism

For the cause of *Terceira*

*Ciprião*

Here, have a cloak

To better embellish your charm

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<sup>83</sup> Bretão, 218.

<sup>84</sup> Bretão, 219.

<sup>85</sup> Bretão, 219.

<sup>86</sup> Bretão, 219.

<sup>87</sup> Bretão, 220.

This is a symbol of the nation  
You are heroic and loyal  
Your name will be immortal  
I believe it for sure

At the battlefield  
We had such wall  
Because all the people consecrated themselves  
To the strong Brianda Pereira  
She is engraved in the hearts  
Of the people of Terceira  
As the most patriotic woman”<sup>88</sup>

The *enredo* [plot] comes to an end and the *mestre*, together with the *choir*, offers the moral of the story: nobody should dare to call Terceira a “fallen land” because its people love it; moreover, even if the Spanish domination of Portugal lasted for many years, at least Terceira enjoyed three more years of freedom than the rest of the country.<sup>89</sup> Finally, the *mestre* thanks the audience for having paid attention to the story.<sup>90</sup>

The mythopoetic contract is thus sealed between the *mestre* and the audience. Who attended the play is now a witness of the events and may perpetuate them at leisure. The modesty of the *mestre*’s initial and final appeals to the crowd contrast starkly with the boldness of the plot but have the effect of closing a circle and restore the normalcy of everyday life. It is as if the *mestre* said: ‘I will take you away for a moment, on a historical journey filled with strong emotions... and now here I take you back to where you were, and please forgive me for the interruption.’

Other circular processes are implied in the plot, although not all the action they refer to take place in 1581. For example, the Battle of Salga is regarded as the end of a negative cycle for Portugal, which began with the battle of Alcácer Quíbir. In terms of participating parties, there is little continuity between the two: the former saw a deposed Moroccan Sultan,

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<sup>88</sup> Bretão, 220.

<sup>89</sup> Bretão, 220.

<sup>90</sup> Bretão, 221.

supported by a Portuguese Army, fight against another Moroccan claimant;<sup>91</sup> the latter was an event belonging to the Spanish siege of a Portuguese island.<sup>92</sup> However, in the play, Brianda's argument speaks of a different temporality, which is determined by Portuguese feelings: Salga was the first victory of the Portuguese after the defeat of Alcácer Quíbir and, as such, had the value of interrupting the seemingly unending series of vicissitudes the country had gone through. As the playwrights know, the Salga had only the effect of slowing down the Spanish conquest, which was completed in 1583; nevertheless, the epic tone of the narrative would not allow for such a notion to tarnish the glory of the victory, on pain of losing the complicity of the audience of Terceiran islanders. Since history cannot be denied, such information is provided at the end, yet with a *but*: 'but at least we enjoyed three more years of freedom than the rest of the country.' That is the same spirit Enes endeavours to catch with the expression "defeated [*vencidos*]... but not convinced [*convencidos*]."<sup>93</sup>

### 5.2.2. *Brianda in 2018*

With a slight dissonance from the narrative of Terceira (and the Azores) as the stronghold of Portuguese identity, the character of Brianda Pereria has now become another trading card in the Terceiran globalization game. For example, Brianda is now a brand of beer produced on Terceira Island (*Cerveja Brianda*, established 2011). As such, this feminine character serves the purpose of qualifying the produce as 'made in Terceira' and promotes a storytelling that could capture the interest of potential customers.

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<sup>91</sup> Luis Filipe Guerreiro da Costa e Sousa, 'O caminho de Alcácer Quibir: Plano, marcha e batalha, ou a dinâmica da forma militar', *E-Stratégica* 2 (2018): 49–61.

<sup>92</sup> Enes, 'A Resistência Popular Terceirense a Filipe II'.

<sup>93</sup> Enes, 175.

The 2018 label of Brianda bottles features a picture drawn by Bruce Azevedo, who introduced some novelties in the legend.<sup>94</sup> First, the famed stampede does not feature generic cattle, but a herd of bulls running toward the viewer.<sup>95</sup> Second, Brianda is represented as a legendary character that dominates the scene in the background, from behind the clouds: her hair is fair and her eyebrows are dark<sup>96</sup>—possibly mindful of the Eighteenth Century standard of beauty described by Sharrow;<sup>97</sup> her dress recalls a vague medieval/early-modern style, with a generous cleavage. Notwithstanding this, it does not appear to reflect a polarized view of gender such as the one described, for example, by Gill in her article on female sexual agency in advertising.<sup>98</sup>

The storytelling of Brianda beer downplays the 1583 Spanish conquest and focuses on Terceira Island as the only extant independent territory controlled by the Portuguese monarchy during the final stages of the succession crisis of 1580. Here follows the English version of the label:

“Legend has it that Brianda Pereira, a popular character from Terceira island, during the battle of Salga, helped expelling the invading Spanish soldiers by releasing wild cattle towards them. The resistance of Terceira island to the Spanish rule lasted two years, becoming the only territory of Portugal and headquarters of the Portuguese monarchy. This battle was won by the people, whose motto ‘Rather die free than in Peace subjected’ still figures in the coat of arms of the Autonomous Region of the Azores.”<sup>99</sup>

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<sup>94</sup> Bruce Azevedo, *Brianda*, 2017, 2017, <https://www.deviantart.com/bruce-azevedo/art/Brianda-Craft-Beer-label-884742239>.

<sup>95</sup> Azevedo.

<sup>96</sup> Azevedo.

<sup>97</sup> Victoria Sherrow, *Encyclopedia of hair: a cultural history* (Westport, Conn: Greenwood Press, 2006).

<sup>98</sup> Rosalind Gill, ‘Empowerment/Sexism: Figuring Female Sexual Agency in Contemporary Advertising’, *Feminism & Psychology* 18, no. 1 (February 2008): 48–49, <https://doi.org/10.1177/0959353507084950>.

<sup>99</sup> Azevedo, *Brianda*.

According to fieldwork informants, this brand of beer received a warm welcome in Terceira, given it was the first contemporary commercial (micro-)brewery of the island, and since it advertised a local legend in an epic way and with innovative artwork. Social network comments by locals are further evidence of this:

“What would planet earth be without Terceira island, and what would Terceira Island be without Brianda, [...] the image says it all, when there is bullsie you gotta say beersie [*quanto há tourinha quer dizer cervejinha*]”.<sup>100</sup>

This social network user says bullfighting and drinking go hand in hand. In fact, as the saying goes in Terceira Island, booze is the “fifth bull:” that is, each *tourada* on the streets involves four bulls offered by the *ganador* and one last bull, which is made of drinks and spirits. The latter one, allegedly, is the one who knocks the people down.

### **5.3. An island of freedom fighters?**

#### *5.3.1. “Defeated but not convinced”*

Terceiran historian Carlos Enes explores some specific connections between the case of Brianda Pereira and Terceiran (perchance Azorean) identity. Faithful to historical sources, he does not focus on Brianda, but traces back the historiography concerning the usage of cattle in the Battle of Salga.<sup>101</sup> In his interpretation, which reflects the principles of Gramscian historiography, the stress is not on women *per se*, but on popular participation to historical events. Enes’ works take up the tradition of social history to show that ‘the People [*O Povo*]’ is an active agent in both local history and geopolitics—and Terceira stands the case.

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<sup>100</sup> Joaquim David Soares, ‘O que seria o planeta terra...’, *Facebook*, 10 June 2018, [https://www.facebook.com/CervejaBrianda/photos/a.2121014911444125/2121014448110838/?comment\\_id=2121996211345995&\\_\\_tn\\_\\_=R\\*F](https://www.facebook.com/CervejaBrianda/photos/a.2121014911444125/2121014448110838/?comment_id=2121996211345995&__tn__=R*F).

<sup>101</sup> Enes, ‘A Resistência Popular Terceirense a Filipe II’, 167.

In an essay concerning the role of Terceira in the Portuguese Succession Crisis,<sup>102</sup> Enes remarks the earliest available source about cattle warfare in Terceira is the aforementioned *Relação*. According to the *Relação*,

“As the island was always full of cattle, close-by there were [cows] in abundance, so that in a short time [the Portuguese] brought a number equal to that of the Castilian soldiers. Upon their arrival, the herdsmen that were accompanying the cows made them scatter and cover all the length of the camp the Castilians were setting up; and behind the cattle all people gathered, so to push the cows against the Castilian soldiers, to the point that when those who were in the rear-guard arrived, they did not know whom to kill. Many [Castilians] jumped in the sea, and since they were heavily armoured, they drowned; other ones, who took their weapons with them in the open waters, could not equip them fast enough to prevent being killed; and the ships and boats far aback were out of range with their arquebuses. The [Castilian] army, [was] very despondent, with lowered flags and banners.”<sup>103</sup>

The 1611 Anonymous then claims only seventeen Portuguese lost their lives in the battle, which was a striking success compared with the demise of the Spaniards on the shore: only fifty of them survived swimming towards their fleet and a couple others were found hiding among the supply crates.<sup>104</sup>

The idea that Azoreans—and Terceiran people in particular—are an untameable lot is not just the result of a Gramscian reading of history: if anything, Enes’ interpretation helps to draw attention to the fact, but his claims are supported by empirical solidity. Therefore, although Gramscian history might have driven Enes’ interests, his historiography is case in point: the fighting spirit of the island appears to emerge during times of crisis.

One such moments was the Liberal Wars (or: Portuguese Civil War) of 1828–1834: Terceira Island sided with the liberal party of King Pedro when his brother Miguel got installed on the throne by the absolutist party. The local independentist movement, supported by the

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<sup>102</sup> Enes, ‘A Resistência Popular Terceirense a Filipe II’.

<sup>103</sup> Anonymous, ‘Relação das coisas que aconteceram em a cidade de Angra, ilha Terceira, depois que se perdeu el rei D. Sebastião em Africa [parte I]’, para. XX (p. 250).

<sup>104</sup> Anonymous, para. XX (p. 250).

geographical remoteness of the Azores, made Terceira the ideal starting point for Pedro's reconquest of the country, to the point he set up in Terceira his temporary government.<sup>105</sup>

However, notwithstanding a history written by the winners, it is now ascertained that the Portuguese Civil War was a divisive moment for the people of Terceira. All rural areas and part of Angra do Heroísmo had a penchant for the absolutists, and the capital of the island became a liberal stronghold only thanks to the coup carried out by Teotónio Bruges and the 5<sup>th</sup> Battalion of Chasseurs commanded by Major Quintino Dias (June 22, 1828).<sup>106</sup> Notwithstanding their naval defeat in the bay of Praia (August 11, 1829), the absolutists kept controlling the countryside until the arrival of Pedro, who defeated them with his men after disembarking in Mindelo (March 3, 1832).<sup>107</sup>

As Enes remarks, in the aftermath of the Civil War and for the rest of the Nineteenth Century all cultural events in the islands were promoted by liberal monarchists. This might have helped construing an image of Terceira as a fiercely liberal island, which was hardly the case. This inclusion in the mainstream liberal narrative casts Terceira as an island of freedom fighters.

### *5.3.2. Tales of nationalism and freedom in Terceira during the First Republic*

As we will see this was reinforced by later narratives produced during the Portuguese First Republic (1910–1926) and the early years of the *Estado Novo*. The Republic had—of course—an anti-monarchic character, so that several festivities and celebrations connected to the monarchy were cancelled. This was a main twist in the political narrative concerning

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<sup>105</sup> Leonardo Bicalho de Mendonça, 'A construção da Monarquia Liberal Portuguesa e os caminhos que a levaram ao próprio fim (1820-1910)' (Barsília, Universidade de Brasília, 2015), 16–17.

<sup>106</sup> Enes, 'A Comemorações do 11 de Agosto, Na Ilha Terceira', 199.

<sup>107</sup> Enes, 199.

cultural heritage. However, this left the local *intelligentsia* with the problem of integrating the history of the island with the values of the new type of government. The process did not raise controversies and unfolded in the two decades after the establishment of the Republic: rather than discarding previous heroic figures, their character was reframed against new values.

Most of such operation could be attributed to the work of the already-cited Gervásio da Silva Lima (1876–1945).<sup>108</sup> This author, who worked as a librarian in Angra do Heroísmo, took upon himself the duty of collecting facts and stories concerning all historical characters that enjoyed a common denominator: being Azorean-born.<sup>109</sup>

As João puts it, “the style of Gervásio Lima is ultra-romantic and openly hyperbolic.”<sup>110</sup> Leite defines him “ultraromantic.”<sup>111</sup> However, what drawback for a historian was instead a positive aspect in the eyes Terceiran readership. Lima’s works, such as *A Batalha da Salga* (1925)<sup>112</sup> or *A Patria Açoreana* (1928)<sup>113</sup> might not have been sophisticated but struck a chord in the local readers—with the complicity of increasingly educated demographics:

“This phenomenon [Gervásio Lima] is worth noticing because of the outcome it had and for its responsibility in the creation of myths that would meet the innermost sentiments of popular psychology—no matter the fact that, in plain historical terms, it was a true disaster.”<sup>114</sup>

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<sup>108</sup> Enes, 204.

<sup>109</sup> Carlos Enes, ‘Lima, Gervásio da Silva’, in *Encilopédia Açoriana* (Lisboa: Centro de Estudos dos Povos e Culturas de Expressão Portuguesa, 2008), <http://www.culturacores.azores.gov.pt/ea/pesquisa/Default.aspx?id=8031>; Maria Isabel João, ‘Discursos sobre memória e identidade, a propósito do V Centenário do Descobrimento dos Açores’, *Boletim do Núcleo Cultural da Horta* 14 (2005): 138.

<sup>110</sup> João, ‘Discursos sobre memória e identidade, a propósito do V Centenário do Descobrimento dos Açores’, 138.

<sup>111</sup> José Guilherme Reis Leite, ‘A historiografia açoriana na 1ª metade do século XX: uma tentativa de compreensão’, *ARQUIPÉLAGO. História*, 2, 5 (2001): 534.

<sup>112</sup> Lima, *A batalha da Salga na Terceira em 25 de julho de 1581*.

<sup>113</sup> Lima, *A Patria Açoreana*.

<sup>114</sup> Leite, ‘A historiografia açoriana na 1ª metade do século XX: uma tentativa de compreensão’, 534.



His authorial view casts all historical characters against the background of a (glorious) national spirit. As such, the actions of the likes of Brianda Pereira are put side by side with those of the liberals: all history, for Lima, could be summarized as progress towards republicanism. In his work, *post hoc factum* teleology justifies past actions: Brianda was not just defending herself and her properties but epitomized the case of a commoner fighting for the freedom of the island; on the same note, the Chasseurs were not fighting for their own interests, but for the establishment of a liberal constitution that would later pave the way for the advent of the Republic. In such a nationalistic—although freedom-loving—fascination, Lima could co-opt all Azorean personalities and use them as the filling for the same warp yarn—the universal advancement of the Homeland:

“In science, in the arts, in literature, and in the fights of colonization and conquest, in the battles for independence and for the national unity, and in all the Azorean works, the ideal of the Homeland [Patria] stands above [everything else], that is, the utmost and constant worry for its greatness and its progress.”<sup>115</sup>

His foreign contemporaries were less critical of Lima’s work. For instance, Arago writes the following praise in *Le Globe: Revue Genevoise de Géographie*: “Therefore, this work constitute a hymn to the Homeland [*Patrie*] and in it the author reveals himself to be a man of heart and, at the same time, a gentle poet.”<sup>116</sup> But even Arago, at some point, feels compelled to specify: “Every page brim with lyrism, yet a lyrism that is a bit pretentious.”<sup>117</sup>

In Terceira, Lima’s approach was shared by others and resulted in the celebrations for the Fifth Centenary since the discovery of the Azores (1432–1932). However, some independent thinkers criticized his attitude. One of them was António Ferreira de Serpa (1865–1939), whom Leite describes as one of the best qualified historians of the time but with a libellous

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<sup>115</sup> Enes, ‘Lima, Gervásio da Silva’, 98.

<sup>116</sup> J. M. Arago, ‘A Patria Açoreana (Les Açores), par Gervasio Lima’, *Le Globe: Revue genevoise de géographie* 70 (1931): 39.

<sup>117</sup> Arago, 39.

personality.<sup>118</sup> The issue was serious because, as Leite recounts, the idea of the Fifth Centenary gave rise to academic malpractice and even the forgery of documents, exacerbated by the fact none of the parties were composed of professional historians.<sup>119</sup> Meanwhile, the times of the First Republic had already come to an end, and the Terceiran people were struggling with the more contemporary issues engendered by the rule of the *Estado Novo*.

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<sup>118</sup> Leite, 'A historiografia açoriana na 1<sup>a</sup> metade do século XX: uma tentativa de compreensão', 528–529.

<sup>119</sup> Leite, 533.

## 6. The Carnival island

This section reproduces the participatory scholarly output whose production was anticipated and outlined in *Section 2.3* and was licensed by the authors in CC BY 4.0.<sup>1</sup> When taking action with assisting colleagues, priority was given to their goal of achieving a major academic publication concerning Carnival, both with the goal of supporting their Island and—I presume—with the implicit aim to advance our knowledge and standing in the academia.

As the *I* of Rapid Assessments became the *We* of collective writing, attention was paid to the different layers of research. The article—which, as I have already anticipated in the footnotes, came out in 2022 for *Sustainability*—reflects the above in its authorship attributions, which are illustrated in *Table 7*.

<b>Role</b>	<b>Contributors</b>
Conceptualization	Andrea Mattia Marcelli, Francisco Sousa, Josélia Fonseca, Leonor Sampaio da Silva, Marxiano Melotti, Susana Goulart Costa
Methodology	Andrea Mattia Marcelli, Leonor Sampaio da Silva
Validation	Andrea Mattia Marcelli, Leonor Sampaio da Silva
Formal analysis	Andrea Mattia Marcelli, Leonor Sampaio da Silva
Investigation	Andrea Mattia Marcelli
Resources	Andrea Mattia Marcelli, Francisco Sousa, Josélia Fonseca
Data curation	Andrea Mattia Marcelli
Writing—original draft	Andrea Mattia Marcelli, Josélia Fonseca, Leonor Sampaio da Silva, Susana Goulart Costa
Writing—review and editing	Andrea Mattia Marcelli, Francisco Sousa, Josélia Fonseca, Marxiano Melotti
Visualization	Andrea Mattia Marcelli, Francisco Sousa, Josélia Fonseca, Leonor Sampaio da Silva, Susana Goulart Costa
Supervision	Andrea Mattia Marcelli, Francisco Sousa
Project administration	Andrea Mattia Marcelli, Francisco Sousa

*Table 7: Authors contributions in the participatory scholarly output.*

Initial attributions were not proposed directly by me but by the other members of the team. I obliged because it looked to me like this table reflected what had actually happened. For

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<sup>1</sup> Creative commons, ‘Attribution 4.0 International (CC BY 4.0)’, Foundation website, 2022, <https://creativecommons.org/licenses/by/4.0/>.

example, empirical investigation came from the data I had collected during my 2020 Rapid Assessment. Co-authors designed the article's structure, which however was later subject to major changes after the requests of three anonymous reviewers recruited by the editors of *Sustainability's* "Tourism, Culture, and Heritage" section.<sup>2</sup> Key support was provided to us by the editors of the Special Issue that hosts the paper, some of which have ties with the University of Azores—though belonging to a different faculty than that of my Portuguese co-authors: Flávio Gomes Borges Tiago and Maria Teresa Borges Tiago (University of Azores), Beatriz Casais (University of Minho), and Androniki Kavoura (University of West Attica).

Another interesting aspect of this participatory experience was that validation was carried out by non-Terceiran authors, that is, Leonor Sampaio da Silva and me. In this respect, I believe this furtherly increased the validity of the study, which blended not just native voices and documentary research and participant observation, but also native management of the academic publication process—yet without creating a situation in which the narrative was exclusively monopolized by local stakeholders.

Such process was not devoid of challenges, but no more and no less than an average academic workplace situation. For example, some issues were raised concerning research ethics not because of the lack thereof but because of the need to decide which University was responsible for what. Namely, since my early data collection was part of the greater project that is being outlined in this book, a decision was made that Università Cusano would be responsible for the documentation and ethical authorisation to address human subjects—that is, something Azoreans did not have to worry about since they did not undertake direct data collection from human subjects.

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<sup>2</sup> MDPI, 'Tourism, Culture, and Heritage', Academic journal website, 2022, [https://www.mdpi.com/journal/sustainability/sections/culture\\_and\\_heritage](https://www.mdpi.com/journal/sustainability/sections/culture_and_heritage).

Furtherly, some issues were raised concerning the representation of Azores' settlement as belonging to the course of 'Portuguese colonialism.' At first, I objected, but then I obliged: first, out of respect for the expertise of my informants; secondly, because we did not want to address a historical debate that fell well without the direct scope of the article we were producing. Brief, the issue was to establish whether the 'Portuguese colonialist machine,' as we know it, had already been set in motion when the Azores got settled for the first time. I took note of that, and I hope I have fully addressed the issue in *Chapter 4* and *5* of the present book, which examines the Azores' developmental context both in light of historical sources and in light of the historiographical narrative (including the way the legend of Briand Pereira has been addressed at different times in history). In these regards, the contribution of Enes, Leal, and Meneses to the debate have been decisive.<sup>3</sup>

I will not spend further words concerning the *process* of writing itself but focus on the analysis and validation of the investigative contents of such participatory activity with regards to the key topics of education and cultural heritage. Thus, this *Chapter 6* will be organised as follows: first it will present all the research outcomes of the participatory activity, in the shape of an academic paper; second, it will carry out a thematic analysis, which will revise the outcomes of the first part in light of interviews.

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<sup>3</sup> Enes, 'A Resistência Popular Terceirense a Filipe II'; Enes, 'A Comemorações do 11 de Agosto, Na Ilha Terceira'; Leal, 'Açorianidade: Literatura, Política, Etnografia (1880-1940)'; Leal, *Etnografias Portuguesas (1870-1970): Cultura Popular e Identidade Nacional*; Avelino de Freitas de Meneses, 'Os Açores e os Impérios: Séculos XV a XX', *ARQUIPÉLAGO. História*, 2, 13 (2009): 205–18.

## 6.1. The Unknown Carnival of Terceira Island<sup>4</sup>

### 6.1.1. Introduction

“Carnival at large is a seasonal festival, possibly rooted in pagan rituals that were Christianized all across Europe.<sup>5</sup> It is known world-wide mainly because of its most visible expressions, especially those that take place in Rio de Janeiro and Venice. But there are unknown varieties of Carnival that need to be further studied for a number of reasons, including their importance for the affirmation of local identities and for the sustainability of cultural diversity. The Carnival of Terceira Island, which is the second most populated of the Atlantic archipelago of the Azores (Portugal), is a case in point because of the unique way in which it interweaves music, drama, and dance into a satirical mix, with the contribution of a large portion of the community.

Through active participation of the local population in all the stages of the festivities—writing scripts, designing and making clothes, rehearsing, performing—Terceira’s Carnival fosters active citizenship alongside education through art and constitutes a cultural and sustainable force that helps to keep alive the heritage and identity fabric of an island society facing the tensions between globalisation and the preservation of cultural diversity. In fact, the island itself, although it was first settled during the early days of Portuguese expansion, currently enjoys both a distinctive Portuguese identity as well as a status among the other islands of the archipelago by virtue of its cultural heritage and of its geopolitical relevance (e.g., Lajes Air Field), and we argue that it is now touched by transformative processes that are more post-modern in kind than post-colonial, such as the admixture of traditions such as Carnival and the contact between the population and the internationalised media.

This paper presents the preliminary results of an interdisciplinary collaboration between native and foreign scholars (respectively: Azorean and Italian) that focuses on heritage studies and community education. As such, it merges bottom-up and top-down investigative needs. On the one hand, the participation of native scholars in the project could stand as a case of participatory research, which testifies the liveliness of cultural heritage care and preservation among the island community. On the other hand, however, the team expressed concerns that the participation of natives to the initiative—and, in particular, natives belonging to a specific social segment—would result in an attempt to control the narrative on the island’s Carnival.

By taking into account the natives’ needs, the possibility of the above biases, and the challenge of interdisciplinary integration, we drew on the Greater Humanities strategic framework. Originally developed by Clifford<sup>6</sup> and further developed by

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<sup>4</sup> This section reproduces the 2022 article published by the research team. It is licensed in CC BY 4.0 (‘you are free to share [and] adapt [...] even commercially’). The main reference for the article is Marcelli et al., ‘The Unknown Carnival of Terceira Island (Azores, Portugal)’.

<sup>5</sup> Susana A. Gastal and Ernani Viana da Silva Neto, ‘Turismo e Cultura: O Carnaval Na Cidade de Maceió (Brasil)’, *Revista Lusófona de Estudos Culturais* 8, no. 1 (30 June 2021): 224, <https://doi.org/10.21814/rlec.2691>.

<sup>6</sup> Clifford, ‘The Greater Humanities’.

Marcelli,<sup>7</sup> the Greater Humanities one is a manifesto that outlines the features of humanist research. Accordingly, it enjoys four dimensions: ethical, empirical, historical, interpretive. That is, all investigations in the humanities shall focus on phenomena that could be empirically appreciated and which enjoy a historical and temporal dimension of their own; furthermore, they should try to understand them (hermeneutics) in ways that solve current (and future) ethical issues. This gives some peace of mind to the cultural scholar since it assumes that no research in the field of humanities is exempt from ethical concerns: as such, it ought to include some level of compromise between participants, as well as the ability to side with them and defend their views.

Ethical concerns could be summarised with the following expression, coined by native scholars: “the unknown carnival”. That would be the Carnival being held on Terceira Island. *Section 6.1.3* is dedicated to the understanding of the peripherality of such cultural phenomenon in light of its current exclusion from the UNESCO World Heritage List and in face to local (and regional) efforts to have it included in international inventories.

To achieve such a goal, the first step identified by the team is that of representation and description. Kaufman believes that linking intangible heritage to places through a process of sustainable bureaucratisation might cut the deal.<sup>8</sup> However, we maintain that we could extend Kaufman’s concept of “space” to non-physical arenas, such as that of media or, as in this case, scholarly production. Therefore, for heritage to be preserved, visibility is necessary in all spaces, either physical or ideal. This brings about two empirical dimensions—one diachronic and one synchronic—the historical one, to which *Section 6.1.4* and *Section 6.1.5* are dedicated, and the contemporary one, which is addressed in *Section 6.1.6* and *Section 6.1.7*.

Our historical investigation will help establish Carnival as both an identarian practice rooted in Terceira Island and as a creative practice. Other than setting the stage for the later stages of inquiry (*Section 6.1.4*), the historical sections make a point of identifying Richerson and Boyd’s interpretation<sup>9</sup> as the most appropriate to understand the evolution of this phenomenon on the island (*Section 6.1.5*).

Our contemporary investigation illustrates the singularity, taxonomy, and structure of nowadays’ Carnival in Terceira (*Section 6.1.6*). In the hermeneutic part of the contemporary inquiry (*Section 6.1.7*), it identifies three core processes that foster the social cohesion of the community: mythopoesis (the birth of Carnival heroes), folk elitism (the distribution of leadership in the community), and subversion of power (when the community feels threatened).

Finally (*Section 6.1.8*), we present an interpretation of what it means for a community to enjoy cultural sustainability in light of Terceira’s Carnival. In particular, the connection between sustainability and identity is explained with the mediation of the concept of culture. These reflections are then connected to Carnival. Furthermore,

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<sup>7</sup> Marcelli, ‘Greater Humanities for Education’.

<sup>8</sup> Ned Kaufman, ‘Putting Intangible Heritage in Its Place(s): Proposals for Policy and Practice’, *International Journal of Intangible Heritage* 8 (2013): 19–36.

<sup>9</sup> P Richerson and R Boyd, ‘A Dual Inheritance Model of the Human Evolutionary Process I: Basic Postulates and a Simple Model’, *Journal of Social and Biological Systems* 1, no. 2 (April 1978): 127–54, [https://doi.org/10.1016/S0140-1750\(78\)80002-5](https://doi.org/10.1016/S0140-1750(78)80002-5).

Hilbers' and Turner's idea that festivals rehearse only the (hi)story of a community<sup>10</sup> is challenged by using Terceira as a counterexample to their theory.

Given this paper presents the results of an early stage of this interdisciplinary project, it is mostly concerned with setting the stage for future in-depth analyses. This means the greatest length of it is dedicated to an interpretive assessment of both historical data as well as empirical data collected in the rapid appraisal activities undertaken by investigators in 2020. Because the Greater Humanities theoretical framework we adopt does not maintain interpretation and empirical accounts are ontologically separate, we elected not to retain a stark distinction between results and discussion, that is, contrary to what customarily happens with investigations that abide by objectivist theories of knowledge.”

### 6.1.2. *Materials and methods*

#### 6.1.2.1. Historical investigation

“Historical research entailed the interpretation of source materials, which are referenced in the bibliography section of this work. Given this article represents the preliminary stage of a long-term project, referenced documents are a subset of all the collected sources. The most important archive, in this sense, is *File No. INPCI\_2020\_002* of the Portuguese National Inventory of Intangible Cultural Heritage [*Inventário Nacional do Património Cultural Imaterial*], which collects written and visual materials concerning Terceira's Carnival.<sup>11</sup> Further materials were made available by the local Terceira Island Carnival Museum ‘Hélio Costa’ [*Museu do Carnaval da Ilha Terceira Hélio Costa*] and by the Public Library and Regional Archive ‘Luís da Silva Ribeiro’ [*Biblioteca Pública e Arquivo Regional Luís da Silva Ribeiro*].

Drawing on the above archives, this paper presents the results of the interpretation of 38 primary sources. These were available only in print, including seven self-printed booklets, 14 folk collections of *danças* and *bailinhos*, 17 newspaper and magazine articles dating 1931–2020. The latter were proved especially relevant for the reconstruction of the links between Carnival and issues of cultural identity on Terceira Island.”

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<sup>10</sup> See Julieanne Hilbers, ‘The Challenges and Opportunities of Community Celebrations That Value Diversity and Foster Unity: Beyond “Spaghetti and Polka”’, *Journal of Arts & Communities* 3, no. 1 (4 May 2012): 23–37, [https://doi.org/10.1386/jaac.3.1.23\\_1](https://doi.org/10.1386/jaac.3.1.23_1); See also Victor V. Turner, *From Ritual to Theatre: The Human Seriousness of Play* (New York: Performing Arts Journal Publications, 1982).

<sup>11</sup> Matriz P.C.I., ‘Ficha de Património Imaterial: Danças, Bailinhos e Comédias Do Carnaval Da Ilha Terceira’, 2020, INPCI\_2020\_002, 2020, database, <http://www.matrizpci.dgpc.pt/MatrizPCI.Web/InventarioNacional/DetailFicha/500?dirPesq=0>.



### 6.1.2.2. Ethnographical Rapid Appraisal

“In addition to documentary evidence, three investigators conducted participant observation on the island during the February 2020 Carnival. Fieldwork entailed: 10 h with the members of a specific play, *Balinho dos Rapazes das Doze Ribeiras*, both on and off stage (one participant observer); 41 h of presence in local theatres where *danças* were being performed in Carnival (six hours in Juncal, eight hours in Serreta, 10 h in Biscoitos, 16 h in Doze Ribeiras). Each performance lasted from 45 to 75 min and involved up to 250 participants per investigated theatre (each surveyed by two participant observers). Overall, the immersion entailed four weeks of presence on Terceira Island for broader data collection, including further observation of rehearsals and neighbourhood interaction before and after the Carnival events, which was facilitated by involvement with two associations for the promotion of cultural and social events (see *Figure 1*). To corroborate preliminary findings, we carried out two longer interviews with privileged observers: one President of a *Junta de Freguesia* (a subdivision of a Municipality) and one member of the “folk elites” (a concept addressed *Section 7.2*).<sup>12</sup>”



*Figure 1: Rehearsal of A corrente do bem, an example of “dança de espada” by the homonymous group of Vila das Lajes, 2020. The “master” is on the left.*

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<sup>12</sup> Huiying Wang, ‘Discourse Used by Folk Elites in the Inheritance of the Rocket Festival in Northeast Thailand’, *Journal of Mekong Societies* 15 (2019): 7694, <https://doi.org/10.14456/JMS.2019.17>.

“Concurrently, 578 visual sources were collected: although media analysis results are not presented in this article, some images have been included to further illustrate the nature of the phenomenon.

Ethnographic research was carried out until we reached saturation of information concerning the guiding concepts of the study. Given the transient and temporary nature of the Carnival events, the team adopted a technique of rapid appraisal. As Beebe remarks: “[a rapid appraisal] is especially relevant when time constraints preclude use of intensive qualitative methods by a single researcher”.<sup>13</sup> Albeit being the subject of seminal historical research<sup>14</sup> it was assumed that the contemporary Carnival, owing to the fluidity of society in Terceira nowadays, did not have features that could be readily identified in advance. Furthermore, its horizontal nature suggested that a multidisciplinary team would be the best to tackle the subject matter. According to Chambers, these are some of the key requirements behind rapid appraisals.<sup>15</sup> Liaisons with privileged observers enabled the adoption of a “system perspective”, whereas contact with Carnival participants, actors, and the broader audience contributed to the triangulation of data.”

#### 6.1.2.3. Limitations to the study

“In presenting our results, we recognize the need to overcome unwarranted distinctions between what is produced by local scholars and what is observed in the field or recorded in primary sources. Thus, the grounding assumption is that Terceira Island entertains a *discourse* on its Carnival, which extends across social segments and diversified media. Meta-anthropologically, even this paper constitutes an item belonging to such discourse, although it aims for greater awareness of this Foucauldian phenomenon.”

#### 6.1.3. An issue of inclusion

##### 6.1.3.1. National acknowledgment of Terceira’s Carnival

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<sup>13</sup> James Beebe, ‘Basic Concepts and Techniques of Rapid Appraisal’, *Human Organization* 54, no. 1 (March 1995): 42–51, <https://doi.org/10.17730/humo.54.1.k84tv883mr275613>.

<sup>14</sup> Bretão, *As Danças do Entrudo. Uma Festa do Povo: Teatro Popular da Ilha Terceira. 1.º Volume*; Duarte, ‘O Carnaval na ilha Terceira’; Carlos Enes, ‘O Carnaval Angrense No 1. Terço Do Século XX’, *Boletim Do Instituto Histórico Da Ilha Terceira* 47 (1989): 291–365; Enes, *O Carnaval na Vila Nova*; Assunção Melo and Luciano Barcelos, *Carnaval na Ilha Terceira: Emoção e Catarse / Carnival of Terceira Island: Emotion and Catharsis*, trans. Luis Mendes, Memórias vivas (ART - Associação Regional de Turismo, 2018); Américo Augusto Teixeira Roque, ‘Danças e bailinhos de Carnaval: qual o significado atribuído às danças e bailinhos de Carnaval da Ilha Terceira?: estudo descritivo e fenomenológico’ (Master’s Thesis, Lisbon, Universidade Aberta, 2013), <http://hdl.handle.net/10400.2/2948>.

<sup>15</sup> Robert Chambers, ‘Shortcut and Participatory Methods for Gaining Social Information for Projects’, in *Putting People First: Sociological Variables in Rural Development*, ed. Michael M. Cernea and World Bank (New York: Published for the World Bank [by] Oxford University Press, 1985), 399–415.

“In 2020, “Danças, Bailinhos e Comédias do Carnaval da Ilha Terceira” were recorded in the National Inventory of Immaterial Cultural Heritage, which is aligned with global initiatives aimed at the protection of intangible culture, led by UNESCO.<sup>16</sup> This follows the 2003 Convention for the Safeguarding of the Intangible Cultural Heritage. A notable aspect is that the notion of safeguard, although prominent in the 2003 Convention, does not appear to have played a major role in the inclusion of Terceira’s Carnival in the Portuguese list of Immaterial Cultural Heritage.<sup>17</sup> In fact, as reported by interviewees connected to the Department of Culture of the Azores Autonomous Region, the listing of Carnival reflected more a situation of wealth than of endangerment. In other words, as an interviewee contended, Terceira’s Carnival is “alive and well”. If anything, participants expressed concerns about its future: while the number of *bailinhos* increases, *danças de espada* are diminishing, and this might call for action in the near future.

The fact Terceira’s Carnival was inscribed in the Portuguese National Inventory of Immaterial Cultural Heritage is also evidence of its relative sustainability. In fact, one of the greatest dangers concerning immaterial cultural heritage is the loss of local participation. That is not the case for Terceira’s Carnival, which enjoys widespread popular support. This led to bottom-up initiatives for the national recognition of the phenomenon, and we argue it became a token in the negotiation of boundaries between the Azores Autonomous Region and mainland Portugal. The involvement of the Azores Autonomous Region in the process testifies that not only communities participate in the Carnival, but also to its recognition. Drawing on the 2003 UNESCO Convention, Sousa recommends participation to decision-making processes concerning heritage,<sup>18</sup> and we argue participatory practices are the cornerstone of cultural sustainability.<sup>19</sup> At the same time, however, Terceira’s Carnival has not yet reached an international level of recognition, with an exception made for expat communities. Such recognition would be more related to the new *global* dimension of immaterial cultural heritage, as enhanced by national and international agencies.”

#### 6.1.3.2. UNESCO and Terceira’s perceived peripherality

“Since 2008, UNESCO has paid particular attention to Carnivals, as a lively expression of local culture and identity: up to now UNESCO has inscribed on its intangible heritage list 14 Carnivals and 4 practices connected with Carnival from 14 countries. In 2019 Portugal obtained the inscription of the “Winter Festivals, Carnival of Podence”, a village in the Municipality of Macedo de Cavaleiros in the

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<sup>16</sup> Matriz P.C.I., ‘Ficha de Património Imaterial: Danças, Bailinhos e Comédias Do Carnaval Da Ilha Terceira’.

<sup>17</sup> Matriz P.C.I.

<sup>18</sup> Filomena Sousa, *The Participation in the Safeguarding of the Intangible Cultural Heritage The Role of Communities, Groups and Individuals* (Alenquer: Memória Imaterial CRL, 2018), 10.

<sup>19</sup> Anka Mišetić and Sara Ursić, ‘The Role of Memory in the Culturally Sustainable Development of Dubrovnik (Croatia)’, in *Theory and Practice in Heritage and Sustainability: Between Past and Future*, ed. Elizabeth Auclair and G. J. Fairclough, Routledge Studies in Culture and Sustainable Development (London ; New York: Routledge, 2015), 78.

northeastern part of the country. This Carnival was selected as a social practice connected with male rites of passage and characterised by a participatory activity embedded into transgenerational mechanisms of informal education. This was an important acknowledgment that marked the insertion of Portugal in the international (and therefore also European) “system” of UNESCO Carnivals. The inscription on a UNESCO heritage list is a fact that can change the image of a place, with significant effects on its social, cultural, and economic dynamics, including tourism. This explains the attention deserved to this Carnival by the “Visit Portugal” website, which presents and promotes it explaining that “The ancient Carnival held in the village of Podence is one of the most important traditional events of northern Portugal” with a “strong participation of the local community that has managed to preserve this tradition for centuries”.<sup>20</sup> Yet this new national and global dimension of Podence Carnival, as a main expression of Portuguese intangible heritage worthy of being regarded as part of the global intangible heritage, ends up redefining the space of Terceira’s Carnival.

In other words, the inscription on the UNESCO list of this *mainland* Carnival contributes to re-affirm a marginal and peripheral role of the *island* Carnival of Terceira, both at the national level of processes related with the UNESCO nomination and at the regional and local level of political and economic stakeholders, who are usually interested in national and international enhancement and exploitation of local culture and events.”

#### 6.1.4. Terceira’s Carnival: historical outlook

“Terceira’s Carnival is a unique kind of popular theatre, locally known as *danças de carnaval*, or simply *danças* [dances], it is deeply rooted in the island’s culture. *Danças* are multimodal: they include dancing, music, and acting. Plays range in topics, and participants to *danças* classify them as either comic or tragic. *Danças* constitute a *sui generis* variety of Carnival, which neither falls into “traditional models from Europe, which tend to anthropomorphize bad ghosts through masks and special kinds of clothing”<sup>21</sup> nor into Rio de Janeiro’s samba parades.”

##### 6.1.4.1. Mythical roots

“To some extent, *danças* resemble satires from medieval Europe, including the Portuguese *cantigas de escárnio e maldizer* (scorn verses), as well as satires written by the Portuguese playwright Gil Vicente (c. 1465–c. 1536). The latter used to portray social and political issues with a satirical, reflective, and critical approach. This ideal connection with Vicente was endorsed, during fieldwork, by a secondary school teacher of Portuguese language and literature, who relocated to Terceira in his late 20s (circa 2014): as such, it constitutes an example of folk theory, through which Terceira’s Carnival participants position themselves in relation to their country’s intellectual history.

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<sup>20</sup> Visit Portugal, ‘Carnival of Podence, World Heritage’, Tourism website, *Visit Portugal* (blog), 2013, <https://www.visitportugal.com/en/content/carnival-podence-world-heritage>.

<sup>21</sup> Duarte, ‘O Carnaval na ilha Terceira’, 87.

The exact origin of Terceira's Carnival is unknown. Duarte suggests it originated because Angra do Heroísmo (Terceira's capital) was the main stopover of the Atlantic sugar trade routes.<sup>22</sup> Hence, the Carnival might have borrowed its practices from Iberia, Madeira, São Tomé e Príncipe, and Brazil in the 15th and in the 16th centuries. According to the same author, in the 19th century some Azoreans who had emigrated to Brazil returned to their homeland and might have imbued Terceira's culture with the Brazilian Carnival of the time.

However, as Ferreira pointed out, between 1840 and 1930, Rio de Janeiro Carnival was already experiencing important transformations, marked by an intense negotiation between different values and cultures.<sup>23</sup> Among the recorded contrasts were: the struggle between public order and leisure activities; Portuguese and French influence; conflicts between the bourgeoisie and the working class. Such contradictions resulted in a system of "many Carnivals". Across the Atlantic, in the same period, similar processes took place in Europe's urban conglomerates.<sup>24</sup> Terceira, in its active relationship with Brazil and mainland Portugal, as well as with European bourgeoisies, might have been caught in between, with an interplay of sociocultural change and hybridization.

Apparently, in Terceira, Christian institutions played a role in the survival of such phenomena.<sup>25</sup> Frederico Lopes<sup>26</sup> and José Orlando Noronha Bretão,<sup>27</sup> in their studies on the culture of Terceira Island, state that the first record of danças can be found in a description of festivities organized by the Society of Jesus in Angra do Heroísmo in 1622.<sup>28</sup> On a similar note, by the end of the 18th century, José Joaquim Pinheiro remarks the existence of "dances and pantomimes" in the Monastery of Jesus of Praia, Terceira Island's second town.<sup>29</sup> However, such a type of "dança, chacota ou invenção" did not coincide with Carnival.<sup>30</sup>

The establishment of "dances" as typical Carnival performances is attested in 1904, when a crew of seamen organized a Carnival dancing show to collect donations for one of their diseased comrades.<sup>31</sup> Nonetheless, Duarte regards 1930 as a more relevant

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<sup>22</sup> Duarte, 'O Carnaval na ilha Terceira'.

<sup>23</sup> Felipe Ferreira, *Inventando Carnavais: O Surgimento Do Carnaval Carioca No Século XIX e Outras Questões Carnavalescas*, História, Cultura e Idéias (Rio de Janeiro: Editora UFRJ, 2005).

<sup>24</sup> Melotti, *Carnevalizzazione e Società Postmoderna*, 6–13.

<sup>25</sup> Duarte, 'O Carnaval na ilha Terceira', 92.

<sup>26</sup> Frederico Jr Lopes, 'As Danças de Entrudo', *Boletim do Instituto Histórico da Ilha Terceira* 11 (1953): 143–51.

<sup>27</sup> Bretão, *As Danças do Entrudo. Uma Festa do Povo: Teatro Popular da Ilha Terceira. 1.º Volume*.

<sup>28</sup> M. d. S. Pinto, 'Festas e danças na Terceira em 1622', *Diário dos Açores*, 30 January 1934.

<sup>29</sup> Matriz P.C.I., 'Ficha de Património Imaterial: Danças, Bailinhos e Comédias Do Carnaval Da Ilha Terceira'.

<sup>30</sup> Enes, *O Carnaval na Vila Nova*, 35–37.

<sup>31</sup> Enes, 'O Carnaval Angrense No 1. Terço Do Século XX', 332; Enes, *O Carnaval na Vila Nova*, 39.

turning point: in that year, *Dança dos Marujos* was performed in Corpo Santo, which is a neighbourhood of Angra do Heroísmo, the main town of the island.<sup>32</sup>”

#### 6.1.4.2. A rural phenomenon?

In the 19th century, when Carnival supposedly began to consolidate its presence in Terceira, society became increasingly secular, and Carnival *danças* followed through. Concurrently, bourgeois social control over the island’s spaces determined the need for specific licenses in order to perform on the streets.<sup>33</sup> This relegated Carnival to the countryside. Accordingly, the elites of Angra do Heroísmo explicitly dismissed Carnival as an event for “ignorant people”<sup>34</sup> and, in open opposition to rural practice, promoted parades and balls with different structure and organization.<sup>35</sup> This is in contrast with the Portuguese mainland’s attempts to “civilize Carnival,” such as those of Porto’s bourgeoisie.<sup>36</sup>

In the countryside, Carnival coincided with initiatives organised by individual hamlets, families, or groups of friends, which would tour local homesteads to deliver their performance *en plein air*.<sup>37</sup> The hosts would reward them with wine and treats prepared for the occasion.<sup>38</sup> The practice recalled in a song transcribed by Inocêncio Enes (1892–1982), who served for more than six decades as parish priest of Altares: “The lyrics you had to listen to are [now] over; dear landowner, please send for someone to open us the gates.”<sup>39</sup>

This rural practice was still occurring in 1948, when the newspaper *A União* reported patrons were hosting *danças* in their front yards.<sup>40</sup> Collected historical pictures record the occurrence of parades in the streets (*Figure 2*), where music bands would play, and independent crews would catch the attention of the audience by staging dances on the go, usually exploring current topics in a humorous and frivolous way.<sup>41</sup> The memories are still fresh among the generation of those born between 1920 and 1940. For instance, during fieldwork a taxi-driver recounted: “[I used to] run behind the *danças* that took place in the street, to collect the ribbons that fell from the hats of the

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<sup>32</sup> Duarte, ‘O Carnaval na ilha Terceira’, 93.

<sup>33</sup> Enes, ‘O Carnaval Angrense No 1. Terço Do Século XX’, 329.

<sup>34</sup> Enes, 326.

<sup>35</sup> Enes, 324.

<sup>36</sup> Sandra Brito, ‘O Carnaval e o Mundo Burgês’, *História: Revista Da Faculdade De Letras Da Universidade Do Porto*, III Série, 6 (n.d.): 313–38.

<sup>37</sup> Stephen Allen, Ann L. Cunliffe, and Mark Easterby-Smith, ‘Understanding Sustainability Through the Lens of Ecocentric Radical-Reflexivity: Implications for Management Education’, *Journal of Business Ethics* 154, no. 3 (February 2019): 90, <https://doi.org/10.1007/s10551-016-3420-3>.

<sup>38</sup> Enes, *O Carnaval na Vila Nova*, 25.

<sup>39</sup> Inocêncio Romeiro Enes, ‘Tradições e festas populares da Freguesia dos Altares (Ilha Terceira)’, *Boltemi do Instituto Histórico da Ilha Terceira* 3 (1945): 309–310.

<sup>40</sup> Anonymous, ‘Dança Do Corpo Santo’, *A União*, 13 February 1948, Biblioteca Pública e Arquivo Regional Luís da Silva Ribeiro.

<sup>41</sup> Matriz P.C.I., ‘Ficha de Património Imaterial: Danças, Bailinhos e Comédias Do Carnaval Da Ilha Terceira’.

dancers, and eventually glue them together with saliva to make a multi-coloured ball.”<sup>42</sup>



Figure 2: “Dança de espada” in the streets, circa 1970. Still frame of a rare colour clip, courtesy of Leonardo Adão.

#### 6.1.4.3. The Twentieth Century and beyond

“Social control became a key issue during the *Estado Novo* authoritarian regime, which was active between 1926 and 1974 (but officialised only in 1933): its reactionary policies opposed what did not fit with State propaganda.<sup>43</sup> As reported by Enes, *danças* and *bailinhos* were subject to censorship and other restrictions in that period. Instead, the democratic regime that followed *Estado Novo* allowed *danças* much freedom to express political criticism.<sup>44</sup> As reported by interviewed performers, after 1974 Terceira’s Carnival gradually shifted from street shows to stages, and the increased availability of transportation (either public or private) allowed acting crews to tour the island and perform in as many stages as possible. “This is all new!” shouted a truck driver to one of the investigators, to overcome the noise of the crowd: “Beforehand, people had no cars, so they would not travel much. So, I tell you: this is

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<sup>42</sup> Sãozinha Nogueira and Francisco Miguel Aguiar, *Agualva: A sua história, as suas tradições e o seu património* (Agualva – Praia da Vitória (PT): Junta da Freguesia da Agualva, 2016), 151.

<sup>43</sup> Fernando Rosas, ‘O Salazarismo e o Homem Novo: Ensaio Sobre o Estado Novo e a Questão Do Totalitarismo’, *História Política* 35 (2001): 1031–54.

<sup>44</sup> Carlos Enes, ‘Qual a origem das danças de Carnaval?’, *Farol das ilhas*, 1 March 1979.

all new.” *Figure 3* displays a charter bus of the Empresa de Viação Terceirense (Terceira’s public transport company) that specifically caters for acting crews.”



*Figure 3: Carnival bus: “507 Merry Carnival”. Transports have redefined Terceira’s inhabitants’ access to Carnival shows.*

“As local communities further developed their taste for music, the number of *Sociedades Filarmónicas* [Philharmonic Societies] increased, and theatres began to crop up in all the parishes that could afford their building. By the 1960s, stage shows took the place of road parades.<sup>45</sup> Consequently, organisers began to invest more on set design.<sup>46</sup> According to an interviewee, the (relatively) cold winter weather played a concurrent role in shifting the stage of Carnival from roads to theatres.

The structure of the most traditional *danças de espada* [sword dances] and *danças de pandeiro* [tambourine dances] remained mostly unaltered, whereas *bailinhos*, whose themes are always light-hearted, extended the segments of acting in each play. This way of organizing carnival was still in place during the 2020 fieldwork activities.”

#### 6.1.5. Scholarly interpretations of the evolution and development of Terceira’s Carnival

##### 6.1.5.1. Heers, Kezich, and Duarte

“Heers maintains that Carnival began as an urban phenomenon that only subsequently got adopted in rural areas.<sup>47</sup> Enes, who originally endorsed the existence of 17th

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<sup>45</sup> Enes, *O Carnaval na Vila Nova*, 43–44.

<sup>46</sup> Allen, Cunliffe, and Easterby-Smith, ‘Understanding Sustainability Through the Lens of Ecocentric Radical-Reflexivity’, 91.

<sup>47</sup> Jacques Heers, *Fêtes des fous et carnivals*, Nouv. éd (Paris: Hachette Littératures, 2007).



century cultural ties with Brazil,<sup>48</sup> concurs with him and claims the same process described by Heers applies to Terceira: born as a festival in Angra do Heroísmo, it eventually spread to the countryside of the island and did not necessarily originate from it.<sup>49</sup>

This is in stark contrast with Kezich's inclusion of European Carnivals in the historical category of "winter festivals".<sup>50</sup> In a move similar to Kezich's, Duarte,<sup>51</sup> who focused his study on Terceira, frames its Carnival as a continuation of archaic pagan rites that still occurred during the European Middle Ages. However, Duarte also agrees that Terceira's current Carnival is "hybrid" rather than traditional. Such a claim raises issues about the supposed ancient nature of the phenomenon. Thus, even assuming that Kezich's<sup>52</sup> and Duarte's<sup>53</sup> are broadly correct concerning mainland carnivals, Terceira's Carnival displays the features of an outlier, and its existence and status should be explained otherwise."

#### 6.1.5.2. Applying Richerson and Boyd's concept of dual evolution

"A solution to this apparent deadlock comes from Richerson and Boyd,<sup>54</sup> according to whom the spread of a cultural trait could take two routes. That is, two processes could occur at the same time. The first one is *guided variation*: individuals first replicate behaviours and then modify them through trials and errors. The second one is *indirect bias*: a group of individuals acquires a new behaviour in bulk, that is, without tinkering with it. O'Brien and Shennan further illustrate this point with reference to artefacts usage: by acquiring best practices in bundle, communities increase their fitness in more meaningful ways than they would through trials and errors.<sup>55</sup>

However, Carnival belongs to intangible heritage, and claims concerning its outcomes for competitive population fitness are tentative at best. Thus, it is more likely that Terceira's Carnival is the result of the concurrent action of both *indirect bias* and *guided variation*: on the one hand, 'urbanites' appropriated an already-formalized practice that originated elsewhere, possibly on the mainland; on the other hand, the broader rural population began to tinker with it and produced unprecedented outcomes of idiographic relevance.

As we have already suggested, such tinkering occurred against the background of a bourgeoisie concerned with imposing morals on Portugal's populace. As reported by Enes, in the 19th century and early 20th century Portuguese society, the higher classes used to regard popular customs as inherently dangerous: either because of their serendipitous unruliness or because they resembled the revolts that stemmed out of

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<sup>48</sup> Enes, 'Qual a origem das danças de Carnaval?', 4.

<sup>49</sup> Enes, *O Carnaval na Vila Nova*, 3; To compare, see Heers, *Fêtes des fous et carnivals*.

<sup>50</sup> Giovanni Kezich, *Carnevale: la festa del mondo* (Bari: Laterza, 2019).

<sup>51</sup> Duarte, 'O Carnaval na ilha Terceira', 87.

<sup>52</sup> Kezich, *Carnevale*.

<sup>53</sup> Duarte, 'O Carnaval na ilha Terceira'.

<sup>54</sup> Richerson and Boyd, 'A Dual Inheritance Model of the Human Evolutionary Process I'.

<sup>55</sup> Michael J. O'Brien and Stephen J. Shennan, 'Issues in Anthropological Studies of Innovation', in *Innovation in Cultural Systems: Contributions from Evolutionary Anthropology*, ed. Michael J. O'Brien and Stephen Shennan, Vienna Series in Theoretical Biology (Cambridge, Mass: MIT Press, 2010), 10–11.

economic malaise.<sup>56</sup> An example is given by early 19th century “night justice raids [*justiça da noite*]”, during which peasants would roam the country wearing hoods and destroying the crops of those who had speculated on the sale of public land.<sup>57</sup> Similar turmoil took place on Terceira at the outset of the 20th century: in 1917 and 1920, mobs assaulted bakeries and shops.<sup>58</sup> Consistently with this, early sources on Terceira’s *danças*, which date back to 1865–1866, describe a series of open-air dances performed by soldiers, not commoners, since the laws [*Editais*] prohibited unlicensed activities in the streets.<sup>59</sup>

Such events reinforce the idea of a dual evolution of Terceira’s Carnival: in the urban area of Angra do Heroísmo, the adopted model was that of a modern and regulated festival, which included, for example, the “battle of the flowers,” whereas the countryside of the island introduced its own innovations without the authorities’ supervision.<sup>60</sup> On the one hand, bourgeois inhabitants of Angra feared the country’s revelry could degenerate into public disorders. On the other hand, marginalized fishermen and peasants felt the need to carve a niche that, although inspired by the urban plays and parades, would not reinforce the status quo of the capital’s hegemony. Thus, it is at this stage that Terceira’s Carnival enters the identity discourse and, as it will be seen below (*Section 6.1.7.3*), identarian processes reflect power challenges.”

#### 6.1.5.3. Originality at the Expense of Historical Continuity

“Hence, the resulting practice is *heterogonous* rather than heterogeneous: at once, both ‘adopted’ and ‘born of the same flesh’. As such, Terceira’s Carnival is better understood as a lively and continuously changing phenomenon than as the remnant of a distant past.<sup>61</sup>

This does not necessarily defeat Kezich’s proposal<sup>62</sup> as far as continental Carnivals are concerned but sets it aside as a genealogical approach governed by the explanatory category of homogeneity, whereas Terceira’s Carnival enjoys its status precisely because of its idiographic singularity of rooted-yet-rootless activity. The same applies to Enes’ perspective: although the archaic/civilised dichotomy plays a part in the city/countryside opposition concerning Carnival, the deriving dialectic is more telling of the later social upheavals he reports.<sup>63</sup> Indeed, although sources report that Portugal had a long-lasting tradition of dances surrounding popular events, such as bullfighting, Enes agrees continuity with *danças* in Terceira Island cannot be fully established.<sup>64</sup> Consequently, research questions concerning sustainability and identity

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<sup>56</sup> Enes, ‘O Carnaval Angrense No 1. Terço Do Século XX’, 310–311.

<sup>57</sup> Enes, 306–307.

<sup>58</sup> Enes, 311.

<sup>59</sup> Enes, *O Carnaval na Vila Nova*, 37.

<sup>60</sup> Enes, ‘O Carnaval Angrense No 1. Terço Do Século XX’, 323–327.

<sup>61</sup> Marxiano Melotti, ‘Le Maschere Della Paura: Colonia e Il Carnevale Nell’età Del Terrore’, *Quaderni Di Sociologia*, no. 72 (31 December 2016): 149–163, <https://doi.org/10.4000/qds.1583>.

<sup>62</sup> Kezich, *Carnevale*.

<sup>63</sup> Enes, ‘O Carnaval Angrense No 1. Terço Do Século XX’, 293–328.

<sup>64</sup> Enes, 329.

are better addressed by a postmodern interpretation of the practice than by a modern view that privileges continuity and tradition over innovativeness and change.”

#### 6.1.6. *Today's Carnival in Terceira*

##### 6.1.6.1. Singularity

“The postmodern character of many contemporary Carnivals has been discussed by Melotti.<sup>65</sup> According to him, cultural heritage, and therefore Carnival, is a cultural and political product, which can be variously negotiated but is always related to the choices and interests of local communities, main territorial stakeholders, agencies building national narratives, and producers of the “tourist gaze”. Economic interests and identarian dynamics have contributed to re-activate and re-invent feasts and Carnivals, which are increasingly embedded in place-branding activities and in territorial and tourist marketing. Thus, this process testifies to a new role and meaning of contemporary Carnival: it often becomes a space where to stage a global identity based on consumption and leisure models. This happens in Carnivalized postmodern societies, which have extended the once unique (and ritual) experience of Carnival to the whole year.

Terceira’s Carnival enjoys a theatrical nature: it is based on stage performances and deeply rooted community dynamics. Texts are constructed by the community, often related to community internal narratives, and performed by the community (see, e.g., *Figure 4*).”



*Figure 4: The Bailinho dos Rapazes das Doze Ribeiras rehearsing in the hall of their town's folkloric group (February 2020).*

“Because its centre is the community, it retains an ‘isolated’ and self-referential character, which, at the same time, reflects the continuity of tradition and the ongoing

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<sup>65</sup> Melotti, *Carnevalizzazione e Società Postmoderna*, 20–21.

transformation of the community involved in this tradition. Furthermore, the fact that the texts are written, spoken, and sung in Portuguese contributes to defining a linguistic and cultural boundary in its fruition, limiting its exportability and its inclusion in international and tourism dynamics. On the contrary, Carnivals based on masks, parades, dances, and floats are potentially more suitable to be inserted into over-local and transnational dynamics, and also to be used in tourist and political dynamics (as often happens with UNESCO Carnivals, including the Podence winter feast). We have to add that masked Carnivals, using (or more and more reinventing) traditional masks of animals, monsters, and spirits, are more easily subject to primitivistic approaches that favour both heritagization and tourism fruition in a process often ending in cultural self-crystallization.

In such a perspective, Terceira's Carnival maintains a peculiar character, expression of its internal tradition, but (up to now) avoids self-crystallization related with heritagization and tourism processes.

Furthermore, this Carnival, being deeply rooted in lively and continuously changing community dynamics, is also a practice capable of absorbing, reflecting, and staging social and cultural change. This is a central point defining a very peculiar status that helps to explain its importance for the community, capable of mirroring itself and the whole society (including not only mainland Portugal but also Western society and, potentially, the rest of the world) through its Carnival stage performances. This is an open door to contemporary global postmodern culture. In other words, Carnival activity lets the community overcome the insular dimension and bridge a gap between the regional and national level as well as between local and global.”

#### 6.1.6.2. Taxonomy

“Nogueira contends that Terceira's Carnival structure is stable.<sup>66</sup> However, by drawing on Enes' work and collected interviews, it is possible to claim the very classification of Carnival-related activities has changed over time.<sup>67</sup> Enes recounts that, in the 19th century, these shows had no name, or got their name after the costumes worn by dancers:<sup>68</sup> in *dança dos ferreiros*, performers would be dressed as blacksmiths; in the *dança da bica*, they would be dressed as chickens; in *dança dos pretos*, they would wear black faces; in the *dança dos mitrados* they would wear the religious garments; and so on.<sup>69</sup>

Later taxonomy divided performances into *danças da noite* (night-time dances), performed with tambourines, and *danças de dia* (daytime dances), which would become known as *danças de espada*. Furthermore, Duarte mentions the existence of three types of *danças* in the 1960s, depending on what is used to direct dancers and actors: either a sword and a whistle (*danças de espada*), a tambourine (*danças de pandeiro*), or a stick with ribbons (*danças de varinha*, *danças de pau de fita* or

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<sup>66</sup> Nogueira and Aguiar, *Agualva: A sua história, as suas tradições e o seu património*, 149–150.

<sup>67</sup> Enes, *O Carnaval na Vila Nova*, 39–40.

<sup>68</sup> Enes, ‘O Carnaval Angrense No 1. Terço Do Século XX’, 328.

<sup>69</sup> See, e.g., ‘Bailinho dos Rapazes das Doze Ribeiras - Os Simpsons - Carnaval 2019’, *Transmissão em direto no Teatro Angrense em Angra do Heroísmo* (AzoresTV, 3 March 2019), <https://www.youtube.com/watch?v=TCQ-iwvOIOg>.

*bailinhos*).<sup>70</sup> According to Duarte, sword dances address religious or historical topics, tambourine dances are satirical or tragicomic, and the latter ones are always satirical comedies.<sup>71</sup>

Nowadays, consistent with Enes' subdivision [18],<sup>72</sup> all the interviewees, in stark contrast with the analytical subdivisions detailed in the above sections, maintain that there are four types of performances: *danças de espada*, *danças de pandeiro*, *bailinhos*, and *comédias* (stand-up comedy or just comic theatre). Occasionally, tambourine dances are included within the broader genre of *bailinhos*.<sup>73</sup> However, the *Carnival Guide 2016*, published with the patronage of the Azorean Government, distinguishes *danças*, *bailinhos*, and *comédias* and puts tambourine and sword dances in the same category. Such subdivision was later confirmed by a 2020 fieldwork observation in Altares parish and is the one used by the Portuguese list of Intangible Cultural Heritage.<sup>74</sup> This probably reflects an incoming process of heritagisation and regulation of the feast by agencies and authorities.

The above taxonomies are evidence of the diversity of Terceira's Carnival. This means its practices are subject to continuing negotiation on behalf of all participants and stakeholders, and strict classification is eluded. This reveals a general feature of "popular culture", which, according to Slater, has a "dynamic character [...] that refuses to respect the fixed, if not always identical, boundaries that scholars draw."<sup>75</sup>

Although islanders display emotional attachment to the current taxonomy, its fairly recent introduction, which occurred in the second half of the 20th century, is further evidence of the fluid nature of Terceira's Carnival, almost as if it embodied a local (folk) theory of what it means to party and have fun, rather than constituting a specific type of ritualised festival. Such a view is so entrenched in neighbouring islands that Terceira is famed (and good-naturedly blamed) for being a party hub. As the saying goes: "The Azores is an archipelago that comprises eight islands and one theme park". Other islands see Terceira as a standalone territory and this is particularly felt in São Miguel, which is the biggest island of the archipelago. As an interviewee put it: "They [Terceirans] are so involved with their Carnival... But I do not feel a connection with it".

#### 6.1.6.3. Pervasiveness

"As of 2020, all kinds of *danças* are organized by groups of amateur actors, usually between 50 and 60 groups per year, who follow an itinerary of performances in more than thirty stages around the island, during a period of four or more days, just before Ash Wednesday. In fact, there are 35 permanent stages, which usually belong to local

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<sup>70</sup> Duarte, 'O Carnaval na ilha Terceira', 88.

<sup>71</sup> Duarte, 'O Carnaval na ilha Terceira'.

<sup>72</sup> Enes, *O Carnaval na Vila Nova*.

<sup>73</sup> Duarte, 'O Carnaval na ilha Terceira', 89.

<sup>74</sup> Matriz P.C.I., 'Ficha de Património Imaterial: Danças, Bailinhos e Comédias Do Carnaval Da Ilha Terceira'.

<sup>75</sup> Candance Slater, 'Approaches to Azorean Popular Culture', in *Actas do 1º Encontro sobre Cultura Popular (Homenagem ao Prof. Doutor Manuel Viegas Guerreiro) 25 a 27 de Setembro de 1997*, ed. Gabriela Funk (Ponta Delgada (PT): Universidade dos Açores, 1999), 471.

associations. In two specific cases, the stages belong to the Municipal Theatres of the island's main towns: Angra do Heroísmo and Praia da Vitória. These are the only two cases in which access to the performances is paid. *Danças* and *bailinhos* may also have some specific performances outside the main itinerary, for example, at schools and nursing homes. Some performances are organized by schools themselves, which reinforces the educational strand of Terceira's Carnival (*Figure 5*). Groups that comprise students, teachers, and other staff members rehearse and perform within their own elementary or secondary schools, and then integrate themselves into the main itinerary."



*Figure 5: Uma vaca feliz, a "dança de pandeiro" by the Projeto Mute EBI Biscoitos. The creation of this "dança" is the result of a school project (2020).*

"According to the Portuguese National Inventory of Intangible Cultural Heritage, Terceira's Carnival involves about "1250 people", counting "only those who perform on stage", which perform in about 1000 shows all across the island.<sup>76</sup> The figure of 2200 min of performance, recorded in the Inventory, is more tentative: it assumes a single acting company performs in all stages of the island. This is not always the case."

#### 6.1.6.4. Structure

"The basic structure is similar in all *danças*. A *dança* consists of a play that is written in verses; it includes live music and dances, as well as simple dancing choreographies at the beginning, in the middle, and at the end of the performance. The actors and the

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<sup>76</sup> Matriz P.C.I., 'Ficha de Património Imaterial: Danças, Bailinhos e Comédias Do Carnaval Da Ilha Terceira'.

dancers are led by a “master” who wears showy clothes and sings in order to greet the audience, identify the parish where the *dança* comes from, introduces the topic and the plot of the play, and also presents a conclusion with an emphasis on “the moral of the story,” just before saying goodbye at the end.<sup>77</sup> Dancers tend to be organized into two wings. In *danças de espada*, actors and dancers constitute two separated groups, whereas in *danças de pandeiro* and *bailinhos* the same performers can act, dance, and play musical instruments. The main difference between a *dança de pandeiro* (Figure 6) and a *bailinho* (Figure 7) is the fact that the “master” plays a tambourine in the former and uses a stick with ribbons in the latter.”



Figure 6: O Casino da Terceira, an example of “dança de pandeiro” by the group António Ivo das Lajes, with three “masters:” two women and one man.



Figure 7: Os Simpsons, an example of “bailinho” by Rapazes das Doze Ribeiras (2019). Courtesy of Hugo Bernardo.

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<sup>77</sup> Duarte, ‘O Carnaval na ilha Terceira’, 88.

“However, many *danças* and *bailinhos* have increasingly introduced changes to the traditional structure. For example, nowadays some of them have several “masters” instead of one, others have no “master” at all, sometimes a short theatrical scene precedes the first words of the “master”, and so on. Far from being relics of historical tradition, *danças* stage the complexity of a contemporary global consumption society, which is the element unifying island and mainland cultures, as well as Portuguese and global cultures. Texts and choreographies, for instance, exploit television, movies, cartoons, and advertisements to build original narratives related to topics and issues significant for the community. That is the case of *Bailinho dos Rapazes das Doze Ribeiras*, which, during the 2019 Carnival, performed *Os Simpsons* (Figure 7), featuring the characters of one of the most popular American series to make, as they explained, “social satire.”<sup>78</sup>”

### 6.1.7. Nurturing social cohesion

#### 6.1.7.1. Mythopoesis: the local ‘heroes’ of Terceira’s Carnival

“Cultural heritage is currently understood as a postmodern construct,<sup>79</sup> which contributes to highlighting a series of features.<sup>80</sup> One of them is integration, which Smith refers to as cultural landscape, but could be extended to the immaterial setting as well.<sup>81</sup> It was already apparent in the earliest recorded instances of Carnival being run in Angra do Heroísmo, which saw the creation at the outset of the 20th century of “parallel” events linked to it: sporting events, competitions, music festivals.<sup>82</sup> Other types of integration relate to the understanding and meaning of Carnival: in Terceira, given Carnival is perceived as a “folk” festival, one would expect a stark detachment from scholarly views. Instead, interviews reveal Terceira’s supposed anti-intellectualism is good-hearted, and its supporters seek repeated engagement with historians and academics: firstly, because enthusiasm for Carnival is so widespread, participants come from all roads of life, and everyone disrobes of their institutional *persona* to wear the shoes of theatrical characters; secondly, because institutions, as well as the academia, are seen as sources of value and legitimacy.

As anticipated above, Terceira’s Carnival is characterised by both broad popular participation and guidance on behalf of privileged individuals, involved in either artistic work, organisation of the dancing events, or both. This leads to a process of mythopoesis that implies the identification and celebration of individuals whose contribution to the Carnival was felt all across the island.

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<sup>78</sup> ‘Bailinho dos Rapazes das Doze Ribeiras - Os Simpsons - Carnaval 2019’.

<sup>79</sup> Beatrice Boufof-Bastick, ‘Measuring the Post-Modern Dynamics of Trinidadian Cultural Heritage’, in *Caribbean Heritage*, ed. Basil A. Reid (Kingston, Jamaica: University Press of the West Indies, 2012), 140.

<sup>80</sup> Melotti, *Carnevalizzazione e Società Postmoderna*.

<sup>81</sup> Julian Smith, ‘Applying a Cultural Landscape Approach to the Urban Context’, in *Conserving Cultural Landscapes: Challenges and New Directions*, ed. Ken Taylor, Nora Mitchell, and Archer St Clair (London: Routledge, 2017), 191.

<sup>82</sup> Enes, ‘O Carnaval Angrense No 1. Terço Do Século XX’, 333–336; Enes, *O Carnaval na Vila Nova*, 20.



During fieldwork appraisals, interviewees would go to great lengths to make the listener “understand” that local playwrights and performers have nothing to be envious of nationally renowned artists, and this is supported by both documentary evidence and social practice. On the one hand, islanders who authored *bailinhos* are treated with reverence. Their works are collected in edited books, and families pride themselves with having a copy at home: an interviewee went to the point of suggesting anthropologists should not interview one of the most famous authors, since he “loved his privacy” and “nuisances could trouble his inspiration”. On the other hand, the most skilled dancers are gossiped about, and people could travel to other parishes just for the pleasure of watching them acting: in Biscoitos, the audience would often display extensive knowledge of the career and skills of a given actor or dancer, even when not strictly connected to the Carnival.

The oldest known example of folk VIP connected to Carnival is represented by Chico Roico (namesake of Francisco Luís de Melo, 1896–1935), whose biography embodies all characters of Azorean entrepreneurship and creativity. Author of *danças* since his early twenties, he relocated to the United States of America to work as a mason, returned to Terceira in 1929, and kept writing until his death.<sup>83</sup> Most of his activity pivoted around the hamlet of Vila Nova, although he appears to have been prolific even when he lived in the United States of America, where his *Dança da Mariquinhas* was performed.<sup>84</sup> Inhabitants of Terceira hold such curriculum in high regard, possibly because it embodies the life cycle of many islanders, who at some stage had to move abroad to make a living. Such an interpretation was confirmed by an interviewee that followed a similar life path, although his activity focused on bullfighting rather than Carnival. The fact that Chico Roico completed grade 12 is dealt with as a badge of honour: indeed, the feat of completing secondary school while working was outstanding for his times.

A second generation of playwrights followed, with Vila Nova’s standing among the most notable ones: Chico Chamarrita (namesake of Francisco Martins Enes, 1926–), Joaquim Faropa (n.d.), José Cardoso Quinteiro (n.d.), Turlu (namesake of Maria Angelina, fl. circa 1948), Manuel Brito de Lima (1915–1970), and Fortunato Melo André (born 1941).<sup>85</sup> Most of them share the same “heroic” features that are often seen in Terceira’s popular narratives: humble origins, secondary education, a job in the trades, and years spent overseas to make a living.

Islanders bestow awards and honours upon these poets and playwrights. For example, in 1979, the Azorean gazette *Farol das Ilhas* suggested that the town council of Vila Nova should name one of its streets after Chico Roico. The article is signed by Enes himself, who, at the time, was carrying out research on the playwright.<sup>86</sup>

Even local historians do not spare their praises. For example, Nogueira writes: “Aqualva had excellent ‘masters’ of *danças de espada* and took high-quality scripts onto the stage, which are still recalled nowadays.”<sup>87</sup> This confirms Enes’ statement concerning the Carnival as a human value-making process within the community,

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<sup>83</sup> Enes, *O Carnaval na Vila Nova*, 45, 49.

<sup>84</sup> Enes, 49.

<sup>85</sup> Enes, ‘O Carnaval Angrense No 1. Terço Do Século XX’.

<sup>86</sup> Enes, ‘Qual a origem das danças de Carnaval?’, 5.

<sup>87</sup> Nogueira and Aguiar, *Aqualva: A sua história, as suas tradições e o seu património*, 147.

since active involvement with a dança “is always a source of pride for any youth, given it has represented, up until today, an important way to affirm oneself and to [obtain] the admiration of the community.”<sup>88</sup>

#### 6.1.7.2. Steering the crowd: the role of “folk elites”

“Consequently, Terceira’s Carnival appears to benefit both from the integration of generic practitioners and from what Wang calls “folk elites”.<sup>89</sup>

Wang’s study does not focus on Carnival.<sup>90</sup> It is a study about the Rocket Festival in Northeast Thailand, which makes it hardly relevant for comparative purposes. However, his initial theoretical contribution, which is grounded on Pareto’s sociology, provides useful concepts of social segmentation that could be used to understand what occurs in the case of Terceira’s Carnival. In fact, it offers objective criteria for understanding social dynamics, no matter the size of the population: all communities identify “quality” individuals depending on their contributions, and such individuals play a prominent role in the preservation, transmission, and re-invention of the cultural heritage.

According to Wang, some of them are “self-related” and mostly concerned with the creation of folk art. In Terceira, playwrights such as Hélio Costa and João Mendonça fall within such a category. Conversely, other quality members of the community are “other-related”: as Wang would put it,<sup>91</sup> although they are not creators themselves, they influence the way heritage is perceived by shifting discourse and reallocating the cultural capital. During fieldwork appraisal in Terceira, César Toste appeared to match the role, since he is “master” of one of the two surviving danças da espada, was member of the Azorean Legislative Assembly from 2016 to 2020, and, when serving as the Mayor of Lajes town, was responsible for the promotion of the local Carnival Museum (*Museu do Carnaval da Ilha Terceira Hélio Costa*). He also contributed to the inclusion of Terceira’s Carnival in the list of Portugal’s Intangible Cultural Heritage.<sup>92</sup>

Another example of an “other-related” character is Carlos Enes himself, whose intellectual activism focused on Terceira’s Carnival: on the one hand, his origins make him a privileged observer of life on the island; on the other hand, both his academic and political career as a Member of the National Parliament make him stand out as an influencer.”

#### 6.1.7.3. Subversion of power

“From a spiritual perspective, laughter is supposed to “clean the soul” and envisage a better future, which is facilitated by a “symbiotic relationship” between the actors

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<sup>88</sup> Enes, *O Carnaval na Vila Nova*, 44–45.

<sup>89</sup> Wang, ‘Discourse Used by Folk Elites in the Inheritance of the Rocket Festival in Northeast Thailand’, 77–79.

<sup>90</sup> Wang, ‘Discourse Used by Folk Elites in the Inheritance of the Rocket Festival in Northeast Thailand’.

<sup>91</sup> Wang, 79–81.

<sup>92</sup> Matriz P.C.I., ‘Ficha de Património Imaterial: Danças, Bailinhos e Comédias Do Carnaval Da Ilha Terceira’.

who play *danças* and the audience,<sup>93</sup> considering also that actors frequently leave the stage and mix with the audience. Carnival functions as a means of social decompression by allowing for an inversion of behaviours.<sup>94</sup> In this respect, inversion of gender roles is emblematic of both the revolutionary and the reactionary nature of Carnival: in 2020, when on stage, male performers might play female roles and vice versa; however, historically speaking, all the oldest members in the audience confirmed that *danças* involved only males. *Figure 8* shows an adult male actor interpreting the role of an elderly female, as in the classic *bailinhos*. Instead, *Figure 9* shows a woman dressed in priestly clothes directing a choir, which is unseen in Catholicism, the main religion of the island.”



*Figure 8: Qualquer Coisa Serve Para Mim, an example of “bailinho” by Rapazes do Chino (California), a Portuguese expat company visiting Terceira Island (2020). The main character is a witty granny played by a male actor.*



*Figure 9: Uma ilha em turbulencia, an example of “bailinho” by Alta Sociedade de Brampton (Canada), a Portuguese expat company visiting Terceira Island (2020). The plot features a priestess, an uncommon sight in Portugal.*

<sup>93</sup> Melo and Barcelos, *Carnaval na Ilha Terceira: Emoção e Catarse / Carnival of Terceira Island: Emotion and Catharsis*.

<sup>94</sup> Carmo Daun e Lorena, ‘Subsídios Para a Análise Da Festa: O Carnaval Visto Pelas Ciências Sociais’, *Revista Lusófona de Estudos Culturais* 6, no. 2 (20 December 2019): 53, <https://doi.org/10.21814/rlec.2110>.

“This means that Terceira’s Carnival shares with other world Carnivals the ability to transfigure the masculine into feminine and to subvert hierarchy [1] (p. 225); however, as a culturally and historically embedded process, it was not immune to patriarchal hegemony. This is in line with the best-known paradox of Carnivals: by making the ordinary extraordinary and by introducing tolerance towards the infractions in the public space, Carnival’s subversive role is defused because it is not taken seriously; retrospectively, this legitimates the status quo and its inequalities.<sup>95</sup>

As anticipated by the guiding theoretical framework, another important feature of *danças* is the subversion of power roles.<sup>96</sup> The liveliness of the event, paired with its ability to occasionally address political issues with poignant satire, did not win the sympathies of *Estado Novo*, which repeatedly attempted to regulate popular expressions and channel them through the filters of dictatorial propaganda, besides using censorship. Undeterred by the efforts of local *Estado Novo* administrations, Terceira’s Carnival continued to thrive. Enes reports that, in 1932, *Estado Novo* took obvious issues with Chico Roico’s *Dança dos Deportados*, which recalled the 1931 rebellions enacted by convicts and deportees against the regime.<sup>97</sup> Surprisingly, the local censors deleted only four lines from this *dança*, including the seditious line: “down with dictatorship!”. However, singers ignored the ruling and sang the lines in front of the censor himself.

Between 1926 and 1974, because of its resilience, Terceira’s Carnival can be classified as one of the several “safe spaces” sought by the Azorean population in face of repression. The apex of political tension would usually be reached when an “old man” or “rat” [*ratão*] would interrupt the performance to publicly blame the actions of notables and politicians, just to be quickly dismissed as “a drunkard”.<sup>98</sup> *Ratão* means “big (fat) rat” but also stands for “comic *persona*”. In other Portuguese idiomatic expressions, “rats” are also those who stay put and keep their mouth shut (“*calado como um rato* [quiet as a mouse]”) but are nonetheless praised for their smartness, brilliance, and wit (“*esperto/fino/vivo como um rato*”). Additionally, “rat” could be used to describe a rouse and a liar (“*enganoso* [deceitful]”), likely involved with thievery: consequently, whatever the rat says shall not be taken seriously (e.g., by the government authorities). Additionally, “rat” could be used to identify someone who is an assiduous frequenter of a bar (“*rato de bar*”), that is, another reason to excuse his words, since he is always drunk. Another important change to the traditional structure consists of the fact that nowadays *bailinhos* and *danças de pandeiro* no longer include a *ratão*, which is evidence of the contemporary relaxed attitude towards satire and shenanigans.

The dialectic of bottom-up power critique goes side by side with current debate on what counts as heritage.<sup>99</sup> In fact, empirical evidence shows that a typical feature shared by Terceira’s Carnival is the continuous reworking of what the Carnival is (and

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<sup>95</sup> Daun e Lorena, 54.

<sup>96</sup> Boufof-Bastick, ‘Measuring the Post-Modern Dynamics of Trinidadian Cultural Heritage’, 140.

<sup>97</sup> Enes, *O Carnaval na Vila Nova*, 47.

<sup>98</sup> Enes, ‘O Carnaval Angrense No 1. Terço Do Século XX’, 330.

<sup>99</sup> Boufof-Bastick, ‘Measuring the Post-Modern Dynamics of Trinidadian Cultural Heritage’, 140.

does) on behalf of local associations vis-à-vis centralization efforts. Indeed, this Carnival displays a multifaceted nature that is negotiated by all participants. Its history is a history of cultural change on behalf of communities that were sensitive to different modes of expression.”

#### 6.1.8. *Terceira’s Carnival and hermeneutics of sustainability, culture, and identity*

##### 6.1.8.1. Cultural sustainability

“Sustainability has occupied the centre of the debate leading to awareness of the challenges facing humankind in the 21st century. Primarily concerned with economic, social, or environmental issues, sustainability has widened its scope in order to reach other fields, namely the cultural arena. After UNESCO had declared 1988–1997 as the World Decade for Cultural Development, the concept of culture gained a renewed dynamism. Reports have increasingly highlighted unequivocal bonds between cultural processes and development on different levels: prosperity, diversity, security, and preservation. The ground was prepared for Jon Hawkes to signal culture as the fourth pillar of sustainability, in 2001. From that point on, several authors and institutions have offered different perspectives on the nexus involving culture and economic development, the preservation of natural resources, environmental balance, the fight against poverty, social inequalities, and/or exclusion from the centres of authority and power.

One of these perspectives states that cultural sustainability is linked to the autonomous development of identities able to resist uniformity-based models of thinking and acting.<sup>100</sup> Another perspective emphasizes the importance of the cultural sector for awareness-raising measures of environmental protection and respect for tangible and intangible cultural heritage.<sup>101</sup> A third perspective focuses on the financial viability of cultural actions and projects.<sup>102”</sup>

##### 6.1.8.2. Culture and identity

“Our preliminary study touches on the first one of these perspectives, and it emerges that culture and identity overlap. They share a common field where questions about who we are, both in personal and collective terms, are raised, and methods of preserving cultural heritage are endorsed. As Hawkes points out, culture participates actively in strengthening values and priorities laying at the core of identity: democracy, inclusion, creativity, imagination, freedom, justice, peace, health, well-being, and vitality are some of the elements that help define who we are and the

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<sup>100</sup> Katriina Soini and Inger Birkeland, ‘Exploring the Scientific Discourse on Cultural Sustainability’, *Geoforum* 51 (January 2014): 213–23, <https://doi.org/10.1016/j.geoforum.2013.12.001>.

<sup>101</sup> Ashok Verma, ‘Sustainable Development and Environmental Ethics’, *International Journal on Environmental Sciences* 10, no. 1 (30 June 2019): 1–5.

<sup>102</sup> David Throsby, ‘Tourism, Heritage and Cultural Sustainability: Three “Golden Rules”’, in *Cultural Tourism and Sustainable Local Development*, ed. Luigi Fusco Girard and Peter Nijkamp, 0 ed. (Routledge, 2016), <https://doi.org/10.4324/9781315258720>.

society we live in, therefore constituting the broad scenario where these concepts meet.<sup>103</sup>

At this point, it might prove useful to clarify the sense in which each of the terms is used. By culture, we mean the sphere in which meaning is produced and disseminated,<sup>104</sup> the arena where conflict, protest, and resistance coexist with conformity and acceptance of representations concerning the self and the fixation of social roles.<sup>105</sup>

It comes as no surprise that, within this expanded territory, identity should occupy an important place. Recent theories of identity formation, namely those originated in media studies, expose the difficult task of studying identity as an isolated concept, estranged from culture, education, or politics. As underlined by Hartley, when analysing identity, these theories “often refer to representations and their cultural consequences”, that is, they build their analysis upon the same sources that Cultural Studies use as working material.<sup>106</sup> Identity politics, for example, “aims to provide a form of political participation for those who are excluded from the traditional means of representation,”<sup>107</sup> a goal shared by Cultural Studies as well.

Despite this common ground, there is no risk of confusing identity with culture. Identity privileges the awakening of self-awareness and of self-assertion alongside the formation of shared spaces of belonging and the struggle to validate them *even if* they are different, if not because they are different. Identity is therefore relational and oppositional. Freitas Jr. and Perucelli seem to agree with this perspective, as they declare that identity is both “a person’s predilections” and “the specific place of belonging which is shaped by culture, including the symbolic grid, beliefs and values that made history”.<sup>108</sup>

The narrative and storytelling of Carnival are, thus, major factors in coming to terms with a community’s roots without falling into the mistaken idea that they define us forever. Part of who we are, or are becoming, is imaginary and symbolic, and therefore constructed inside discursive strategies. Identity is formed within “figured worlds,”<sup>109</sup> spaces where people “figure” who they are “through the activities and in relation to the social types that populate these worlds.”<sup>110</sup> Work locations, schools, and leisure spaces are important sites to “figure” and therefore to trigger action bringing self-awareness and transformation.

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<sup>103</sup> Jon Hawkes, *The Fourth Pillar of Sustainability: Culture’s Essential Role in Public Planning*, repr. (Victoria: Cultural Development Network, 2003).

<sup>104</sup> John Hartley, *Communication, Cultural and Media Studies: The Key Concepts*, 4th ed, Routledge Key Guides (Abingdon, Oxon ; New York: Routledge, 2011), 51.

<sup>105</sup> Terry Eagleton, *After Theory* (London: Penguin, 2004), 56–61.

<sup>106</sup> Hartley, *Communication, Cultural and Media Studies*, 45.

<sup>107</sup> Hartley, 101.

<sup>108</sup> Miguel Archanjo Freitas Junior and Tatiane Perucelli, ‘Cultura e Identidade: Compreendendo o Processo de Construção/Desconstrução Do Conceito de Identidade Cultura’, *Cadernos de Estudos Culturais* 2 (2019): 112.

<sup>109</sup> Dorothy C. Holland, ed., *Identity and Agency in Cultural Worlds* (Cambridge, Mass: Harvard University Press, 1998).

<sup>110</sup> Luis Urrieta and George W. Noblit, eds., *Cultural Constructions of Identity: Meta-Ethnography and Theory* (Oxford ; New York: Oxford University Press, 2018), 19.

But attachment and identification are temporary. Identity is sutured by “points of temporary attachment to the subject positions which the discursive practices construct for us.”<sup>111</sup> All identities are consequently plural and dynamic, “multiply constructed, across different, often intersecting, antagonistic discourses, practices, and positions”, subject to a “radical historicization” and to an endless “process of change.”<sup>112</sup>

### 6.1.8.3. Identity and power

“A point of fact is that “identity is about power. Power is at the root of who ‘counts’ as belonging to an identity, as well as who is able to self-define, self-identify, and deny to others their identity.”<sup>113</sup> As stressed by Stuart Hall, identity can only function as attachment if it uses the power “to exclude, to leave out, to render ‘outside’.”<sup>114</sup> It is crucial to understand the mechanisms that produce and distribute power, be it material, social, or symbolic, in order to identify patterns of dominance/dependence, oppression/agency, and to revise what is validated or rebuked, who is heard and who is ignored, so that all identities receive equal treatment and benefit from the same rights and opportunities.

Human activities are repeatedly constrained by parts of the environment and, in turn, effect changes on it. Hence, whenever an act of power takes place, even spontaneously, the fabric of society is folded, perchance ruptured, meaning all making of Self comes at a cost (be it environmental, political, or both). As Heizmann and Liu put it: “sustainability issues are intrinsically tied to issues of identity.”<sup>115</sup>

In the last years of the 20th century, contributions from Anthropology,<sup>116</sup> Feminism,<sup>117</sup> Cultural Studies,<sup>118</sup> and Literature<sup>119</sup> offered a new perspective, following the very influential paper of Davies and Harré.<sup>120</sup> The basic assumption is that the individual’s positioning in terms of race, gender, and class often surfaces in speech acts and symbolic representations. Discursive practices and representations are, thus, an important tool not only for forming individual identity, but for

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<sup>111</sup> Stuart Hall and Paul Du Gay, eds., *Questions of Cultural Identity* (London ; Thousand Oaks, Calif: Sage, 1996), 6.

<sup>112</sup> Hall and Du Gay, 4.

<sup>113</sup> Urrieta and Noblit, *Cultural Constructions of Identity*, 4.

<sup>114</sup> Hall and Du Gay, *Questions of Cultural Identity*, 5.

<sup>115</sup> Helena Heizmann and Helena Liu, ‘Becoming Green, Becoming Leaders: Identity Narratives in Sustainability Leadership Development’, *Management Learning* 49, no. 1 (February 2018): 4, <https://doi.org/10.1177/1350507617725189>; See also Allen, Cunliffe, and Easterby-Smith, ‘Understanding Sustainability Through the Lens of Ecocentric Radical-Reflexivity’.

<sup>116</sup> Holland, *Identity and Agency in Cultural Worlds*.

<sup>117</sup> Judith Butler, *Gender Trouble: Feminism and the Subversion of Identity: Tenth Anniversary Edition* (New York: Routledge, 2014).

<sup>118</sup> Hall and Du Gay, *Questions of Cultural Identity*.

<sup>119</sup> Paula M. L. Moya, *Learning from Experience: Minority Identities, Multicultural Struggles* (Berkeley: University of California Press, 2002).

<sup>120</sup> Bronwyn Davies and Rom Harré, ‘Positioning: The Discursive Production of Selves’, *Journal for the Theory of Social Behaviour* 20, no. 1 (March 1990): 43–63, <https://doi.org/10.1111/j.1468-5914.1990.tb00174.x>.

empowerment, resistance, will, and agency. Cultural processes dealing with critical and creative possibilities in several representation systems, especially language, foster imagination, improvisation, and innovation, moving away from (even if incompletely) determinism and dependence.

The ability to entertain multiple dialogues is a means of endowing oneself with a voice that is actually heard externally, a voice that enjoys the satisfaction of authorship, and, at the same time, responds to a world in which struggles for power are constant. Identity formed in the context of activity and language can strengthen collective bonds, promote membership, and effect changes, while simultaneously generating a sense of personal accomplishment. In the same line of thought, Moran defends that identities are shaped within the joint forces of the self and the others.<sup>121</sup> The claim for association is always present, requiring individuals that are driven and willing to adjust to unstable environments. The performative aspect of identity has been highlighted by Judith Butler in her studies of feminist identity, but is equally applicable to other identities.<sup>122</sup> Performance enables individuals to experience ways of acting in life, which expands their range of choice with regard to who they want to be and to become. Through cultural performance, the individual is put at the centre not only of cultural activity but of socio-political action, which, in turn, raises issues of citizenship. From this perspective, a citizen is a dynamic unity of the individual self and the communitarian self that is, a human being who interacts with the Other in a given space and faces challenges.<sup>123</sup> The challenge of ensuring sustainability for future generations is a case in point.”

#### 6.1.8.4. Tackling Azorean identity

“As we turn to studies concerning Azorean identity, we notice the prevalent use of an essay by the Azorean writer Vitorino Nemésio, entitled “*Açorianidade*” (Azoreaness), which offers a definitive statement on being an islander and living in the Azores.<sup>124</sup> The author highlights the importance of the clouded sky, humidity, the smallness of the islands, volcanism, religion, and the ever-present ocean.

Important as this text is, it does not account for conflict in Azorean society; on the contrary, it presents a static image of an ordered society threatened mainly by external factors, namely industrialisation and foreign practices. Social inequality, power struggles, resistance to dominance, internal change, and fracture are neglected within the general idealisation of a rural landscape which is perfect except for the natural catastrophes it is subject to, owing to its volcanic origin. But even this challenging element aids to compose an idealised description of the population.

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<sup>121</sup> Anthony Elliott and Anthony Moran, eds., ‘Indigenous Identities: From Colonialism to Post-Colonialism’, in *Routledge Handbook of Identity Studies*, 1st ed., Routledge International Handbooks (London: Routledge, 2011), 347–63.

<sup>122</sup> Butler, *Gender Trouble*.

<sup>123</sup> Josélia Fonseca, ‘A Cidadania Como Projeto Educacional: Uma Abordagem Reflexiva e Reconstitutiva’ (Unpublished Doctoral Thesis, Angra do Heroísmo, Universidade dos Açores, 2011), <https://hdl.handle.net/10400.3/2501>; For the published version, see Josélia Fonseca, *A Cidadania Como Projeto Educacional: Uma Abordagem Reflexiva e Reconstitutiva* (Saarbrücken, Germany: Novas Edições Acadêmicas, 2016).

<sup>124</sup> Nemésio, ‘*Açorianidade*’.



Thus, it is epistemically more appropriate to shift attention from top-down approaches to identity, which use ready-made categories, to bottom-up processes of identity-making. Accordingly, we argue that the case of Carnival as it appears on Terceira Island can be understood on the basis of a non-essentialist view of identity, that is, one that emphasises the interplay between identity, power, and sustainability that we have summarised above.

Carnival is a popular festival, which could be classified as a “folk practice”. As such, it requires popular commitment to a common performative goal, which is not directly linked to issues of environmental fitness for the practicing population. Nonetheless, Terceira’s Carnival tells a tale of sustainability: on the one hand, it puts a stress on the island’s resources (either human or material); on the other hand, it offers an inclusive model of interaction, which is a key element of societal cohesion, wellbeing, and welfare. Moreover, this Carnival represents a case of community education that stands at the crossroads between formal practices and informal learning.

It is a regulated activity through which creativity is expressed, thus triggering individual innovations within the frame of seemingly fixed theatrical practices. It represents popular authorship and offers a critical view of social institutions, figures of authority, and centres of power.

Postmodern practices and sustainability entertain a complex relationship, and Terceira’s Carnival is no exception. In this study, we have identified a diversified web of connections between Terceira’s Carnival and social classes, cultural practices, folk art, intangible cultural heritage, identity, and sustainability. There is clear evidence of it mirroring and contributing to the design of a specific island identity within the Azorean context.”

#### 6.1.8.5. A counterexample to Hilbers’ and Turner’s theory

“Terceira’s Carnival challenges the entrenched views on the identity-making function of “community festivals”. In this respect, it does not meet requirements for the definition proposed by Hilbers.<sup>125</sup> Hilbers draws on Turner<sup>126</sup> and claims “community festivals and celebrations are ritual events that tell the story of a people, often through music, dance, art, food, and iconography.” Moreover, he contends they blend storytelling and story-making, by making these practices become part and parcel of a community’s identity-making practices. Yet, in the view of Turner, Carnivals do not belong to such category: he sets them aside because he believes they enjoy a non-compulsory nature and, as such, they cannot enjoy the status of “rituals”.

The case of Terceira proves otherwise. It enjoys both a ritual nature and a creative opening towards the re-definition of the community identity. Its flexibility is at the core of its sustainability, because Terceira’s Carnival enables participants to shift positions across the social spectrum and, alternatively, to either support the status quo or hurl the community towards the unknown. As De Matteis put it, festivals cannot be only about the (hi)story of a given community, and Terceira proves the point.<sup>127</sup>

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<sup>125</sup> Hilbers, ‘The Challenges and Opportunities of Community Celebrations That Value Diversity and Foster Unity’, 24.

<sup>126</sup> Turner, *From Ritual to Theatre: The Human Seriousness of Play*.

<sup>127</sup> Stefano De Matteis, ‘Introduzione All’edizione Italiana’, in *Dal Rito al Teatro*, by Victor V. Turner (Bologna: Il Mulino, 1986), 20.

Does lack of historicity entail challenges in identity-making? Quite the opposite: Terceira's Carnival enjoys a strong identity, not because of its specific contents, but because it is a process. Contents, such as the topics of Carnival tales, are fully negotiable; the structure is negotiable too, as demonstrated by our historical appraisal. This leaves identity-making to the enactment of a process.

If, for Turner,<sup>128</sup> "tribal" communities are so norm-driven that even the festivals' subversion of social order is dictated by collective rules, "modern" communities, to the contrary, deploy practices that emphasise the inventiveness of emancipated individuals. Terceira's Carnival is an exacerbation of the latter. By pushing such reasoning even further, it could be possible to frame Terceira's Carnival as a practice that, through its emergent character, steers a society towards a postmodern fruition of cultural (co-constructed) reality, although maybe not in the 'continental' ways understood by Melotti.<sup>129</sup>

Its theatrical element enhances creativity and adds cultural value to both individuals and the community. Its performances interweave music, drama, and dance into a satirical mix, which highlights the multi-faceted nature of collective prosocial undertakings that reflect the yearly social, economic, and political agenda. The point of view is not determined by authorities, the elites, or those who hold power, but by a combination of players from several social backgrounds. Rural minorities take the floor, and the subversion of power roles offers them visibility.

One of the most salient findings of this study is that Terceira's Carnival fosters active citizenship, as it brings together people who otherwise would hardly meet around the leading concerns of the community every year; it promotes education through art, by creating an opportunity to practice storytelling, dancing, playing music, singing, and acting; it constitutes a cultural force, which, by means of sustainable conduct, manages to keep tradition alive without neglecting contemporary matters of general interest. To put it simply, it helps to preserve the fabric of an island society that faces the tensions between globalisation and cultural diversity. In the process, it empowers the participants, whose voice is heard and even written for future memory."

#### 6.1.9. Section conclusions

"In this paper, we endeavoured to illustrate several points concerning Terceira's Carnival. First, it constitutes a projection towards an idealised communal history, rather than the result of long-term historical processes. Second, the best way to understand its double nature or rural and urban Carnival is better explained by the theory of dual cultural evolution. Third, the analysis of its taxonomy shows that both its structure and understanding has changed over the past hundred years. Fourth, it features three concurrent processes that contribute to community cohesion: mythopoesis (local 'heroes'), folk elitism (distribution of power), and subversion (reaction to hegemony).

Consequently, we argued that Terceira's Carnival displays both modern and postmodern features and is employed by the islanders as a tool to negotiate their identities in face of ensuing globalisation. They are able to do so thanks to the

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<sup>128</sup> Turner, *From Ritual to Theatre: The Human Seriousness of Play*, 86–87.

<sup>129</sup> Melotti, *Carnevalizzazione e Società Postmoderna*.

identarian dimension of the process, which, in turn, makes it possible to create a self-referential sandbox in which islanders can stage their values. This makes Terceira's Carnival a case of cultural sustainability: the practice, as it was observed in 2020, is healthy and far from being crystallised by administrative heritagisation processes. Notwithstanding its relative wealth, this phenomenon remains marginalised owing to the peripheral nature of Azores islands and calls for greater attention towards its possible inclusion in international inventories.”

## 6.2. Thematic analysis

### 6.2.1. *Peripheral participation: leaving the streets*

Transports in Terceira have been extensively dealt with in *Section 6.1.4.3*. However, the topic is not just sociologically relevant in itself but because of the consequences it bears for the construction of communities of practices,<sup>130</sup> as outlined in *Sections 1.2.5.* and *2.1.1.*

In fact, as anticipated in the former sections, communities of practice require some form of peripheral participation to ensure prospective members get acquainted with the work of experts and learn from them. On the one hand, we tied the notion of peripheral participation to the ability of a community to tolerate learners that perform in sub-standard ways yet without marginalizing them; on the other hand, we stressed the inherently spatial nature of peripheral participation.

However, as remarked by Hoadley, the spatial issue could be reframed as an issue of communication technologies.<sup>131</sup> In fact, he observes that the very notion of “community of practice” stemmed out of studies on the ability of ICT people to participate settings (such as forums or newsletters) where knowledge could be shared. Hence, I maintain that we should restructure Hoadley's concept to emphasise the fact the contact between learners could be

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<sup>130</sup> Lave and Wenger, *Situated Learning*; Hoadley, ‘What Is a Community of Practice and How Can We Support It?’

<sup>131</sup> Hoadley, ‘What Is a Community of Practice and How Can We Support It?’

obtained in both digital and physical ways, and that the Carnival of Terceira Island is an excellent confirmatory example in this sense.

In her non-structured interview, Melo reiterated that availability of transports on the island changed the Carnival performance.<sup>132</sup> While gossiping during 2020 Carnival, a truck driver with experience in both Terceira and the United States told me the same story while holding a cup of red wine: “This is all new!” he shouted to overcome the buzz of the crowd getting in and out of Doze Ribeiras’ *salão*, “Forty years ago *bailinhos* would not go further than the neighbouring *freguesia*!”<sup>133</sup>

Counterintuitively, as transports increased, Carnival moved from the streets to theatres. This observation is compelling, because it tells of the strong relationship between lived (public) space and cultural heritage. This was neatly explained by Maduro-Dias in his interview: roads changed purpose and their usage grew in intensity; this meant more regulations and the need to deliberate about the possibility for cultural practices to occur on the streets or elsewhere.<sup>134</sup> back in the days when fast transports and street paving were not readily available, the people—i.e., local *freguesia* residents—would make use of the streets of their village as they pleased; instead, nowadays they have more responsibilities towards the occasional traveller or passer-by.

I tried to reframe these statements in a neutral way, but Maduro-Dias is convinced the interpretation of the phenomenon should be more politically charged: the loss of local control on the streets is not just due to the increased relatedness between islanders but to expansion

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<sup>132</sup> Assunção Melo and Andrea Mattia Marcelli, *Entrevista com Assunção Melo*, wav (Angra do Heroísmo, 2022).

<sup>133</sup> Andrea Mattia Marcelli, ‘Conversation with a truck driver’ (Field journal, 23 February 2020).

<sup>134</sup> Francisco dos Reis Maduro-Dias and Andrea Mattia Marcelli, *Entrevista com Francisco dos Reis Maduro-Dias*, wav (Angra do Heroísmo, 2022).

of the State. That is, road management is not just a matter of *res publica* in the pure and contractualist sense of the expression but of the exercise of regulatory power on behalf of centralised authorities—that is, apparatuses.

Maduro-Dias confessed to me that some thoughts crossed his mind as he spoke with me; therefore, I would like to offer a more radical interpretation of what he told me and take responsibility for it. According to such perspective, I maintain that there is a possibility that central authorities are over-extending their purview as long as roads are concerned. Such assertion requires further qualification. First, the idea of a ‘central authority,’ here, is relative to the scope of the sample: for example, for the *freguesia*, the central authority is the Municipality or the Regional Government; analogously, a Municipality might perceive the Regional Government as a centralising authority, but also the State... and so on. Second, the over-extension of an apparatus<sup>135</sup> is not necessarily the result of intentional action on behalf of its managers: in fact, in *Section 1.2.* we have ascertained the need to avoid mentalistic analyses of supra-individual social phenomena. Nonetheless, an issue remains as per *how* the apparatus is being deployed and what strategic goal it is achieving.

That is, the apparatus of ‘public space management’—which is likely scattered across different central departments of the Municipality *and* of the Azores Autonomous Region—appears to be following a strategy that goes in the opposite direction of cultural heritage preservation, perchance unwittingly and unwillingly. What Maduro-Dias highlighted in his interview is that, concerning traditional activities, roads were part and parcel of the activity.<sup>136</sup> Unknowingly of him, while talking to me in a different conversational setting,

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<sup>135</sup> For a definition, see *Section 2.1.3.*

<sup>136</sup> Maduro-Dias and Marcelli, *Entrevista com Francisco dos Reis Maduro-Dias.*

Melo concurred with such idea:<sup>137</sup> if there is a distinctive aspect in the performance of *danças*, it is that their choreography and steps had developed to cater for the needs of a *marching* troupe, and not its action on a theatrical stage. This notion is reinforced by her scholarly interpretation of the phenomenon; in fact, in the 2018 book on Carnival she co-authored with Barcelos, she talks of “life between two wings”—the two wings being the two lines of marching dancers.<sup>138</sup> In her opinion,<sup>139</sup> choreutes represented the most distinctive idiographic aspect of Terceira’s Carnival. Therefore, in the spirit of my conversation with Maduro-Dias,<sup>140</sup> I maintain the loss of control of the streets might constitute a symptom of decline in a given road-based cultural practice. Rather than being perceived as fully *public* and freely usable, the roads of the island are now something the people should ask permission to use. Theoretically, permission is asked to the collective; practically, however, permission is asked to a centralised authority who *purports* to represent the collective.

However, *contra* my hermeneutics of Maduro-Dias, one might object that the transition of Carnival from *open air* activity to theatrical play followed social developmental lines that are not fully accounted for by the centralisation of public services—such as the management of the streets. In fact, Maduro-Dias’ observations were mostly concerned with *touradas*, which make a notoriously controversial use of the public arena: bulls can hurt people,<sup>141</sup> crush shops,<sup>142</sup> and damage property.<sup>143</sup> Instead, Carnival is a more light-weight event and less

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<sup>137</sup> Melo and Marcelli, *Entrevista com Assunção Melo*.

<sup>138</sup> Melo and Barcelos, *Carnaval na Ilha Terceira: Emoção e Catarse / Carnival of Terceira Island: Emotion and Catharsis*.

<sup>139</sup> Melo and Barcelos.

<sup>140</sup> Maduro-Dias and Marcelli, *Entrevista com Francisco dos Reis Maduro-Dias*.

<sup>141</sup> Viewer discretion is advised: see *Tourada à Corda Casa Da Ribeira 11 Julho 2019 Ganadeiro HF*, 2019, sc. 09:20, <https://www.youtube.com/watch?v=hNQEw5wBwKY>.

<sup>142</sup> See the example of a bull entering a bar. Viewer discretion is advised: see *MARRADAS BRUTAIS #07*, YouTube upload, 2017, sc. 05:00, <https://www.youtube.com/watch?v=cOwYhoLKH1Y>.

ethically controversial. Melo, for example, believes that the main reason to move indoors was the weather, and that this had the effect of boosting comedic *bailinhos* at the expense of *danças*—which are harder-to-arrange on stage.<sup>144</sup> Severino, on a similar note, remarks several times that he cannot overrate the comfort of sitting in a chair as a *bailinho* unfolds.<sup>145</sup>

In both early participant observation and later interviews, it appears clear that the residents of the Terceira Island's *freguesias* have not yet taken a deciding stance on space usage during the Carnival. For example, although local *salões* imitate theatres (in terms of infrastructure), local management (usually: Philharmonic Societies) are reluctant to regulate accesses, differently from the stable Theatre of Angra does. In fact, as Severino remarked, in a *salão* you always risk losing your seat to some newcomer: no reservations can be made.<sup>146</sup>

The resulting impression, for the attendant, is that of contemporary Carnival as a series of overlapping 'peripheries.' Differently from old-time *danças*, such as the 1970s one portrayed in an anonymous video uploaded by Adão Leonardo,<sup>147</sup> the crowd cannot gather around dancers, nor theatrical action can take place in different corners of the same village. Conversely, the theatrical set-up of *salão* fosters the emergence of a dichotomy between the audience and the showpeople. Nevertheless, borders are still blurred. For instance, although the streets are mostly left clear of marches and pranks, they have become areas of transition,

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<sup>143</sup> To fully appreciate the extent of this statement, I strongly recommend watching the following video: *Tourada Na 'praia Com Marradas e Cenas Engraçadas /Funny Video on Beach /Açores*, YouTube upload (Açores, 2019), <https://www.youtube.com/watch?v=3JGOE91hK1E> Unfortunately, I was unable to ascertain whether this was filmed in Terceira or in another island of the Azores. Given the attire of the pastores and the landscape resembling the beach of Praia, Terceira Island is the most likely location.

<sup>144</sup> Melo and Marcelli, *Entrevista com Assunção Melo*.

<sup>145</sup> Carlos Severino and Andrea Mattia Marcelli, *Entrevista com Carlos Severino*, wav (Angra do Heroísmo, 2022).

<sup>146</sup> Severino and Marcelli.

<sup>147</sup> *Dança de Carnaval 1970*, 1970, [https://www.youtube.com/watch?v=my1p3\\_LJS3Q](https://www.youtube.com/watch?v=my1p3_LJS3Q).

where *bailinhos* and other dancing troupes take a pause as they travel from one *freguesia* to the other. Streets have also remained optimal waiting spots (in good weather) and a place to chill out and relax from the pressure of the people crowding the *salão*. Another area of transition is constituted by the bar of the *salão*, which almost always precedes the hall with the stage and seats for the audience. That is, if for the contemporary visitor a *salão* might look like a cinema with a bar at the entrance, it reproduces in fact the dynamics of a public hall or public house: one area is dedicated to food and beverage, while the other one is dedicated to entertainment and leisure. As people stand up and circulate over the course of the four days-long Carnival shows, the inflow and outflow of the audience is continuous and overlaps with that of organizers, managers, and *bailinho* members themselves.

I maintain this is a form of space usage that fosters the existence of what Lave and Wenger would call “legitimate peripheries,”<sup>148</sup> which help newbies getting acquainted with the Carnival. The case of Avelar is emblematic: originally uninterested in Carnival (he came from another island), he began his involvement by driving around his wife (a Terceiran woman) and his father.<sup>149</sup> The latter had developed a taste for Carnival during his early years as a soldier, in the 1940s.<sup>150</sup> The car became Avelar’s first periphery. Then, given the long wait for his kins, he began to frequent the bar. Eventually, he peaked in. Finally, he began to attend whole shows.

Spatially speaking, as long as Terceira’s Carnival is able to foster the existence of areas of transitions such as the ones I have described, attendance and the ‘recruitment’ of an audience is almost guaranteed. It is thus likely that a ticketing service (such as the one pioneered in

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<sup>148</sup> Lave and Wenger, *Situated Learning*.

<sup>149</sup> João Avelar and Andrea Mattia Marcelli, *Entrevista com João Avelar*, wav (Angra do Heroísmo, 2022).

<sup>150</sup> Avelar and Marcelli.



Porto Judeu)<sup>151</sup> would act as a barrier because it would require the prospective audience members to deliberate in advance concerning his attendance; furthermore, paying for a ticket would tie the audience to the fruition of specific goods and services, thus encapsulating the cultural heritage practice into a system of commodification.

### 6.2.2. *Peripheral participation: taking the stage*

Another prominent aspect that is focal to peripheral participation is not space per se, but the ability of Terceira's Carnival to be inclusive. In fact, *section 6.1.8.4.* talks of an “inclusive model of interaction, which is a key element of societal cohesion, wellbeing, and welfare.”

It might be redundant to notice that contemporary Carnival involves an imposing share of Terceira's Island population.

The diffusion of *salões* results in the Island enjoying 35 permanent stages.<sup>152</sup> Considering a minimum capacity of 100 audience members per *salão*, this means that, over the four days of Carnival, at any given time, there are always *at least* 3,500 people attending the shows. However, this is an underestimate, because *salões* are usually overcrowded, and the actual number could be double, if not triple the minimum estimate. In addition to that, there are the troupe members of *danças* and *bailinhos*. Thanks to the *Carnival Ilha Terceira* app,<sup>153</sup> I was able to count up to 92 different troupes: 60 *bailinhos*, 10 *comédias*, 10 *danças de espada*, 11 *danças de pandeiro*. Instead, the *Carnival 2020 Guia de Salão*, which does not record *all* groups but just those that performed in 2020, listed 81 different troupes: 50 *bailinhos*, 6 *comédias*, 6 *danças de pandeiro*, 1 *dança de espada*, 17 senior *bailinhos*, and 1 senior *dança*

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<sup>151</sup> Severino and Marcelli, *Entrevista com Carlos Severino*.

<sup>152</sup> See *Section 5.1.6.3.*

<sup>153</sup> Cybermap, ‘Carnaval Ilha Terceira’, Android 4.0.3 (Ponta Delgada, Portugal), accessed 1 May 2020, <https://play.google.com/store/apps/details?id=pt.cybermap.carnavalilhaterceira>.

*de pandeiro*.<sup>154</sup> Senior *danças* and *bailinhos* usually perform weeks before the Carnival, in events for the elderly. Including actors, dancers, and players, on average a *comédia* puts at least two people on stage, a *bailinho* and a *dança de pandeiro* at least 10, and a *dança da espada* at least 25. Considering that, it follows that at least ~800 take the stage over the course of four days. All these tentative figures suggest that, as of 2020, Terceira's Carnival had *at least* 10,000–11,000 participants, that is, one fifth of the Island resident population. However, the figure could easily be higher and because the audience takes turns in theatres. So, how could an event that is so widespread and all-encompassing be 'peripheral' in essence? The answer is that 'periphery' is not the same as 'marginalization.' Considered as a whole, Terceira's Carnival is totalizing, and stops many activities on the island for at least four days. However, precisely because of its transient nature and its diverse composition, Carnival is indeed inclusive in the peripheral sense of the term understood by Lave and Wenger.<sup>155</sup>

First of all, each *bailinho* might involve participants at different stages of expertise. As Severino remarked to me, social classes do not seem to matter and everyone is equal in the context of the feast.<sup>156</sup> Further gossip with subjects involved with the Sociedade Filarmónica Progresso Biscoitense, which is directed by Eugenio Simas, revealed that professional musicians play side by side with amateurs—and the same would happen with people with different degrees of acting skills. In other words, *danças* and *bailinhos* round up motley crews of performers, thus fostering knowledge sharing and cross-contamination.

Given some roles are fixed within a *dança* or *bailinho*, interaction is not always communal. During my 2020 participant observation following the Rapazes das Doze Ribeiras *bailinho*

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<sup>154</sup> Foto Iris, 'Carnaval 2020: Guia de Salão', 2020.

<sup>155</sup> Lave and Wenger, *Situated Learning*.

<sup>156</sup> Severino and Marcelli, *Entrevista com Carlos Severino*.

group, I realized that each *bailinho* is broken down depending on macro-roles. For example, exception made for collective rehearsals, musicians and actors would gather separately, each team focusing on preparing their specific tasks. Actors rehearse their pieces in a hall offered by a folkloric group, whereas the orchestra practices elsewhere. However, on weekdays in the run-up to the Carnival, both teams would get together after their sessions to share drinks and *linguiças* (sausages). As one of my key informants told me, such gatherings are first and foremostly gatherings of friends. There, I heard participants talking of all sorts of topics, with discussions that ranged from national politics to everyday chores.

Thanks to this kind of break-down of activities, individuals are able to self-regulate their degrees of involvement in a *bailinho*. For example, an actor might be able to participate rehearsals but not join the following party because of some personal commitments. Such back-and-forward movement of people, both in terms of gathering spaces and timetables, gave me the impression of breathing communities, which can cradle or can let it go, to each according to her need.

Instead, I suspect *danças*—and *danças de espada* in particular—give less freedom because of the fact they are tightly structured. Unfortunately, I was not able to fully verify such suspicion, and my only sources are anecdotal: some side remarks on behalf of people close to the Sociedade Filarmónica Progresso Biscoitense and to the Dança da Espada da Vila das Lajes suggested that timetables are tighter, and expectations are higher. That is heuristically intriguing, because, if confirmed, it would prove that a process of heritagization is taking place in which *danças* (and *danças de espada* in particular) are increasingly seen as a fixed genre provided with high standards, whereas *bailinhos* remain the anarchic incubator for new theatrical expedients. Such separation might have been exacerbated by the fact that,

notwithstanding the inclusion of all Carnival shows in the Portuguese List of Intangible Cultural heritage, it is clearly the *dança de espada* that takes the lion's share.<sup>157</sup> I argue the reason for that is that the heritagization process that takes place in Portugal entails, as it is customary in the Western World, the use of historical arguments to back up the value of a cultural phenomenon facing the accreditation authorities. Hence, because of its costumes, its historical or religious subjects, its well-established dance steps, and its ability to trace its own genealogy back to the street dances of the old times, current *dança de espada* has always been the most palatable bridgehead in the official heritagization of Terceira Carnival.

Possibly, *danças de pandeiro* constitute a counterfactual that backs up the above argument. Gossiping members close to Sociedade Filarmónica Progresso Biscoitense and Escola Básica Integrada dos Biscoitos told me that, in fact, *danças de pandeiro* had been at risk of disappearing completely from the scene. Why? Because of the corporativism that surrounded them. In fact, my informants told me of how *pandeiro* apprenticeship was (and is) way more difficult than participation in a *bailinho* or even a *dança da espada*. *Danças de pandeiro*, as illustrated in *Section 6.1.6.* involve a dancing *mestre* who is able to both time the interactions of the orchestra with his or her whistle *and* dance with a tambourine in a quite acrobatic way. The technique is not intuitive and needs guided practice. Therefore, my informants told me, there was a time (pre-1970s, I assume?), in which the *pandeiro* dancers would keep their skills within their families or within a restricted circle of practitioners—like a guild. One reason for that was that such performers were in high demand and teaching one's techniques could jeopardize the ability to profit from it. As a result, *danças de pandeiro* became a highly refined genre, but with an ageing population of practitioners who were reluctant to teach new

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<sup>157</sup> Matriz P.C.I., 'Ficha de Património Imaterial: Danças, Bailinhos e Comédias Do Carnaval Da Ilha Terceira'.

generations ‘of strangers’ their professional secrets. That is, a case of exclusion and elitism rather than democratic inclusion.

However, as my informants told me, the tables have turned on this sect of practitioners. The mastermind behind the new wave of *danças de pandeiro* is claimed to be Eugenio Simas. Simas is an accomplished musician, composer, music teacher at the and Escola Básica Integrada (EBI) dos Biscoitos, as well as the director of Sociedade Filarmónica Progresso Biscoitense. In the past decades, I was told, he developed what would become the ‘Projeto MUTE.’ The name of the project stands for *música* and *teatro* and involves

Ana Cardoso, who is both a teacher and the elected Head of the School of EBI Biscoitos, used these words to describe this project in a 2020 public presentation:

“Since it is the tenth year this dance has been active, I believe it is appropriate to spend a few words [on it] and to give some special thanks. One year has passed [since last performance] and we are still here, very pleased, to present the *dança de pandeiro* of the Projeto MUTE of Escola Básica Integrada of Biscoitos. This project is very cherished by the school: because of its inclusiveness and because of the way it promotes our folk culture [*cultura popular*]. In the past ten years, up to 108 students have participated the project and performed in 24 *danças*. We have already met in this *salão* some alumni, who used to be *dançarinos* or *mestres* in the past. All of them have been trained by Professor Eugenio, music teacher, who dedicates himself with hard work, a lot of patience, and who, with much kindness, transforms these children in little great actors. A special thanks goes to the parents of these children, to the teaching staff, and all who [...] collaborated to the project.”<sup>158</sup>

One of the immediate effects of such ten years-long project has been that of fostering a resurgence of *danças de pandeiro* in the island. Contrary to the informal participation that surround *bailinhos*, *danças de pandeiro* have thus profited from a formal education institution (i.e., EBI Biscoitos), which ensured the creation of an area of peripheral legitimate participation in which young learners could gradually become acquainted with the ways of

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<sup>158</sup> *Dança de Pandeiro do Protejo MUTE EBI dos Biscoitos - Carnaval 2020* (Sala de Espectáculos da Sociedade Recreativa do Divino Espírito Santo do Raminho, Ilha Terceira, Açores, Portugal: From Azores YouTube Channel, 2020), sc. 00:26.

the *pandeiro*. ‘Projeto MUTE’ is not just concerned with *danças de Carnaval* but fosters participation to theatrical and musical activities all year round.

Another provision, concerning children, is that they cannot participate the *danças de pandeiro* organized by the school once they become alumni. This is a notable reversal of Lave and Wenger’s notion of peripheral participation: eventually, in a knowledge society, functioning communities of practice do not just nurture roles, spaces, and times, in which gradual engagement can take place, but also roles, spaces, and times, in which disengagement *must* take place. That is a key aspect of all apprenticeships and learning programmes: they eventually come to an end. Of course, this is more easily detectable in formal contexts such as EBI Biscoitos’ extra-curricular Projeto MUTE; however, the achievement of autonomy on behalf of learners—that is, the shift from ‘learner’ to ‘expert’—must also go through a detachment from the old educational settings.

I maintain that this latter remark, which has been hermeneutically inspired by the experience of Projeto MUTE, is not incompatible with the idea of “lifelong learning.” In fact, as Billet observes, lifelong *learning* pertains to the individual, whereas *education* enjoys a more distinctive institutional character.<sup>159</sup> In this regard, Projeto MUTE is not a lifelong education project, but this does not entail it is unable to equip its participants with lifelong learning competencies.

In addition to the above, experiences such as Projeto MUTE had impacts not just on individual learners but to both families and the whole Biscoitense community. “Parental

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<sup>159</sup> Stephen Billett, ‘The Perils of Confusing Lifelong Learning with Lifelong Education’, *International Journal of Lifelong Education* 29, no. 4 (July 2010): 401–13, <https://doi.org/10.1080/02601370.2010.488803>.

investment” in their offspring is an evolutionary fact,<sup>160</sup> but it appears to be fostered by parent participation in the school lives of their children. Informants informally reported to me that several families created close ties as parents brought their children to the *dança* rehearsals of Pojeto MUTE, and that such parents went to the extent of surprising their children by setting up a surprise performance in which they imitated their children on stage—the latter was a *bailinho* for their eyes only, which amused everyone and created a good-hearted atmosphere. Another type of peripheral participation to Carnival that it is worth remarking in light of the later non-structured interviews is the emergence of a network of critiques and *connoisseurs*. This was reported to me especially by Severino<sup>161</sup> and Melo,<sup>162</sup> and was implicit in the biographical narrative of Avelar.<sup>163</sup> As I was told, some of the audience engage in practices that resemble those of theatre or cinema critiques: they gather all information they can on *bailinhos*, they trade news and leaked information on how some *bailinhos* are going to be like, they carefully schedule their presence at *salões*, and take notes about the *danças* and *bailinhos* to discuss their merits and flaws with their family and other connoisseur friends. This activity brims over the four days of Carnival and extends to the weeks preceding and following the feast.

In his interview, *cantador* [singer] Mendes Costa (brief: Eliseu) explained to me that criticism might change depending on how close a *freguesia* is to the city of Angra.<sup>164</sup> Again, in Terceiran narratives, the ‘urban vs. rural’ dichotomy reemerged. According to Eliseu, in

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<sup>160</sup> See, e.g., Michele K. Surbey, ‘Developmental Psychology and Modern Darwinism’, in *Handbook of Evolutionary Psychology: Ideas, Issues, and Applications*, ed. Charles Crawford and Dennis Krebs (Mahwah, N.J.: Lawrence Erlbaum Associates, 1998), 369–404.

<sup>161</sup> Severino and Marcelli, *Entrevista com Carlos Severino*.

<sup>162</sup> Melo and Marcelli, *Entrevista com Assunção Melo*.

<sup>163</sup> Avelar and Marcelli, *Entrevista com João Avelar*.

<sup>164</sup> José Eliseu Mendes Costa and Andrea Mattia Marcelli, *Entrevista com José Eliseu Mendes Costa*, wav (Angra do Heroísmo, 2022).

rural areas “people” pay more attention to the formal aspects of cultural heritage practices, whereas, in urban areas, non-urban cultural heritage was welcomed mostly because of its entertainment value.

Eliseu’s argument mainly focused on *cantigas* (songs) such as *velhas* and *cantigas do desafio* [song duels], which constitute a chapter of their own in the history of Terceiran cultural heritage. Nonetheless, Carnival enjoyed similar dynamics. Rural Carnival, that is, the ‘old times’ Entrudo that took the streets, was very concerned with the creation of shows that respected a certain form, especially in terms of lyrical, rhetoric, and narrative structure. The subject of a *dança de dia* was supposed to be serious—usually historical or at least tragic, if not both—and highest value was tributed to the ability of authors to write quatrains or sextains constituted of seven-syllable verses. Traditional rhyme schemes were highly prized: alternate (e.g., ABAB) or simple (e.g., ABCB). Critiques would deem a piece exceptional either because of its compliance with the standards or because of its ability to comply with standards *and yet* produce something new or unheard of. The same went for the subjects of the *danças*: it appears that since their earlier inception, *danças de espada* have always been a serious business in Terceira Island, with authors delving deeper in historical textbooks (when available) to ensure the faithfulness of the story being told on the streets.

The idea of rural connoisseurs having been historically more focused on form than entertainment value might sound like a reversal of the dominant ‘countryside vs. city’ narrative. According to such narrative, which was reiterated in *Sections 6.1.4.* and *6.1.5.*, the countryside of Terceira Island has always worked as an incubator that would borrow only part of what was being introduced in Angra do Heroísmo from Mainland Europe or other overseas territories and proceed to create its own original version of the Carnival feast. However, according to the ‘rural connoisseur’ theory, which emerges from my hermeneutics of Eliseu’s interview, once the above productive and creative process got enshrined in rural



tradition, the rural informal regulatory framework began to exert its pressure on performers. Instead, the urbanites of Angra do Heroísmo would overlook formal inaccuracies and praise pieces that enjoyed high entertainment value.

Although, a quantitative analysis of qualitative data in the Twentieth Century is not available concerning the urbanites' attitude towards Terceira's Carnival, part of the shift in Angra's popular interest for rural heritage is represented by the summary produced by Rocha during our interview.<sup>165</sup> In his historical recount, Rocha identified different intellectual figures that embodied different stages of Angra do Heroísmo's attitude towards rural cultural heritage. The first character is Frederico Lopes: a conservative, he was a man of the *Estado Novo* and supported the overcoming of tradition that was not compatible with the conservative and corporatist projects of the regime. Instead, Ribeiro was both a conservative and a republican: he believed that rural cultural heritage could be salvaged, but only as far as it proved useful for the progress of society. It was only later, however, that rural-style Carnival became truly popular in Terceira: it was Bretão who was responsible for such popularisation.

Bretão has not only authored books on Carnival,<sup>166</sup> but threw a bridge across the experience of *bailinhos* and the popular theatre he was trying to nurture through his participation in the *Fanfarrã Operaria* (Angra's workers' band) and other annexed associations. Rocha described him to me as more of an anarchist than a socialist, although most of what he did in life was aimed at raising the living conditions of workers. For him, I was told, theatre was not only an instrument of emancipation: it was a metaphor for life.

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<sup>165</sup> José Olivio Mendes da Rocha and Andrea Mattia Marcelli, *Entrevista com José Olívio Mendes da Rocha*, wav (Angra do Heroísmo, 2022).

<sup>166</sup> Bretão, *As Danças do Entrudo. Uma Festa do Povo: Teatro Popular da Ilha Terceira. 1.º Volume*; Bretão, *As Danças do Entrudo. Uma Festa do Povo: Teatro Popular da Ilha Terceira. 2.º Volume*.

Following this line of thought, which brought him closer to Brecht, Bretão organized training sessions for workers that entailed both acting and preparing to deal with authorities—including employers. For example, Bretão would teach workers how to *act* like lawyers when facing their employers, thus nurturing all sorts of unionist attitudes despite widespread repression by the *Estado Novo*. Additionally, it could be argued that cultural associations were politically relevant precisely because the regime would try to suppress other forms of more openly political associationism. In this sense, Bretão's theatre constituted one of the lifelines of democracy during the last decade of the regime.

Notwithstanding the above, Bretão's view of rural *danças* was as innovative as narrow. Melo observes that he contributed to shift the focus from dancing to acting,<sup>167</sup> and, with Eliseu, we might observe that Bretão's popularization of Angra happened thanks to his engagement in a sort of informal heritagization process:<sup>168</sup> that is, he published books on the topics, shaped the narrative of Carnival after his Brechtian view of reality, and 'dignified' it in the eyes of intellectuals and urbanites by showing that complied with the well-established, though hegemonic, category of national theatre. Notwithstanding this, it is likely that, without a character like Bretão, Terceira's Carnival would have paid even more the toll of anonymity.

### 6.2.3. *Terceira's Carnival: negotiability*

*Section 6.2.1.* established that Terceira's Carnival fosters peripheral participation through a multi-modal use of the island's spaces. In particular, notwithstanding its historical shift towards indoor acting, it still nurtures a flexible system of participation, which, in turn fosters the engagement of both audience and performers.

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<sup>167</sup> Melo and Marcelli, *Entrevista com Assunção Melo*.

<sup>168</sup> Costa and Marcelli, *Entrevista com José Eliseu Mendes Costa*.

But legitimate peripheral participation is not limited to this. In fact, as *Section 6.2.2.* illustrated *bailinhos* and *danças* over-extend themselves, with a multiplicity of satellite activities that help people regulate their engagement with the community. Participation ranges from mere attendance to the event to organization, acting, playing an instrument, writing the lyrics, conceiving of a play subject, sewing costumes, arranging scenography, etc. Additionally, *Section 6.2.2.* explored other forms of peripheral participation that multiply the layers of engagement. First, because some formal education institutions (namely, EBI Biscoitos) have intervened to salvage cultural heritage practices (e.g., *dança de pandeiro*) that were at risk of disappearing because of the rampant sectarianism that surrounded them; second, because indoor Carnival has fostered the birth of a class of critiques and *connoisseurs*, which take pride in the evaluation of *danças de Entrudo* by offering a folk buffer against which authors, actors, and musicians can measure themselves.

The existence of such feedback processes suggested a closer analysis to the form–freedom dyad in Terceira’s Carnival. Namely, interviewees tended to agree that rural carnival was less regulated in terms of State and dominant narrative but more regulated in terms of informal cultural norms, which were enforced in ways that made Carnival shows less palatable to Angra’s intelligentsia—at least until characters such as Bretão came into play.

These latter remarks lead us back to the original analytical categories of this study, which have been detailed in *Sections 1.2.7.*, *2.1.2.*, and *2.1.3.*: situatedness and practice. Situatedness brings about the operationalizing notion of *negotiability*. But what is it that Terceira’s people negotiate through Carnival? The answer is manifold, because at different times of their history, the entire *apparatus* of Carnival got deployed to achieve different strategic goals. The following sections are dedicated to analysing its themes.

### 6.2.3.1. Negotiating marginalization

If we give credit to Nemésio's definition of *Açorianidade*,<sup>169</sup> we might come to the conclusion that, at least until the 1920s, Terceira's rural populace used Carnival dances to negotiate their marginalization. Terceira's centrality in the major Atlantic trade routes, together with its geopolitical relevance, never sufficed to save its rural population from being pushed at the margins of the Portuguese empire—especially in the Nineteenth Century. That is not to say that the urbanites of Angra do Heroísmo or Terceira's elites did not enjoy inclusion in the broader discourse of Portuguese nationhood; quite the opposite. However, as far as rural population was involved, rampant illiteracy and lack of global outreach fostered the emergence of a rural class with little involvement in central political activities and regional management. This, of course, stands in contrast with the narrative of the Azoreans as the head starters of Portuguese expansion. Think of the interplay between globalizing, internationalizing, and localising processes: even when the booming demographics of the Azores favoured migration to other continents, this had happened for long times under the monitoring of the Portuguese State, whose continental elites had vested interest in moving people and resources. By that, I do not mean to deny the objective *importance* of Azores and the Azoreans; however, what we witness concerning Nineteenth Century and early-Twentieth Century dynamics is clearly the result of some sort of structural discrimination. However, the suspicion, here, is that such discrimination is not due to a specific geographical handicap; rather, it is the result of the constitution of a bourgeois State and of a bourgeois sense of nationhood. In this negative sense, Azores enjoy no negative primacy with regards to other peripheral and less peripheral areas of Portugal or Europe. Thus, I argue that the first negotiation that occurred through Carnival was a sort of preservation of identity facing (and

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<sup>169</sup> Nemésio, 'Açorianidade'.

in spite of) broader national and supra-national processes that did not fully take into account Azorean rural agency.

Possibly, the most significant moment occurred when Carnival turned the tables between the city of Angra do Heroísmo and its rural surroundings. With moving words, Melo told me that, after the devastating earthquake of January 1, 1980, Terceira was in dire straits. All the island was gravely hit by the earthquake, and destruction in the city, where buildings were taller, was tremendous. Victims without a house were placed in stadiums, gyms, or other temporary shelters. What Melo told me is that, in the aftermath, during the reconstruction efforts, *bailinhos* and *danças* would come to the city to rekindle the spirits of the community. Other than Bretão's earlier effort, that was possibly another moment in which the city found unity with rural areas facing the earthquake. Contamination occurred, and Carnival increased its share of participants.<sup>170</sup>

#### 6.2.3.2. Negotiating political freedom

A second type of negotiation *through* Carnival is utterly political and became especially relevant in the years of the *Estado Novo* regime. It is true, as claimed in *Section 6.1.7.3.*, that the *ratão* is possibly a Carnival character with a long history; however, current narrative mentions it almost only in relation to political subversion during the *Estado Novo* period. This narrative is partly ultra-contemporary but partly serves the strategic purposes of the Portuguese Third Republic and its emancipation from the oppressive fascio-corporatist regime that ruled it since the mid-1920s.

This does not mean that the Carnival was fully hijacked and piloted by anti-fascist forces. Quite the opposite. It tells a tale of subtle (and less subtle) acts of subversion, stemmed from popular malaise than the clear directions of a political opposition. They ensured Terceira

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<sup>170</sup> Melo and Marcelli, *Entrevista com Assunção Melo*.

could enjoy sandboxes of freedom amidst the widespread censorship. For example, in some of the stories collected by Neilson et al. women reported that going at sea meant for them a way to find peace from the political oppression of the regime. In such context, Carnival represented another form of relief. Such a relief, however, appears more like a coping mechanism than a concerted series of actions aimed at undermining censorship and centralized power. However, brick by brick, the defences of the Terceiran people grew in strength and eventually their actions became bolder and more open. *Ratões* would grow more outspoken, and even entire dancing troupes began to openly challenge authority—such as the one who performed the *Danças dos deportados*, as told by Enes.<sup>171</sup>

The negotiation of political freedom continues still today, although in different fashion. The *ratão* is no more needed to make allusions to government officials and their misdeeds: democracy ensures free speech and the authors of *bailinhos* spare no blows against what the people perceive as wrong or in need of a fix. For example, Severino told me of how the apparatus of Carnival, thanks to its flexible mesh, is able to sift the news and adapt to the vogue of the day. Authors rewrite their scripts almost until last minute to ensure all themes are catered to. Namely, dejected public buildings, bumpy roads, broken street lighting, corruption, major geopolitical events, funny stories, urban legends, movies, and so on.

A social worker, who pleaded to remain anonymous, told me that all political satire during the Carnival is not diversity-conducive.<sup>172</sup> I see her point: Terceira's Carnival, and *bailinhos* in particular, are never politically correct, and often reflect a desecrating view of values and diversity. That is not to say that this Carnival's sarcasm is exclusively outwardly oriented; in fact, there is a lot of self-irony, which can be detected both in the ability of Terceiran people

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<sup>171</sup> Enes, *O Carnaval na Vila Nova*.

<sup>172</sup> Anonymous and Andrea Mattia Marcelli, 'Entrevista com uma assistente social em Angra do Heroísmo', 11 May 2022.

not to take themselves seriously and in the skills of authors such as João Mendonça, whom, as Severino told me, has fully refined his literary and satirical ability, to the point of raising the stakes for everyone who will one day join him in the Carnival pantheon.<sup>173</sup> Notwithstanding such ingenuity, the social worker is correct in noticing that, notwithstanding women's (relatively recent) inclusion in the Carnival, sexism is still rampant.

However, differently from the social worker, I do not feel we should go to the extent of considering the Carnival as just another expression of the *status quo*. Indeed, some Bakhtinian process takes place: reality is thrown upside down for four days, just so that the island can go 'back to normal' once the feast is over.<sup>174</sup> However, broad participation of individuals of all classes, genders, and origin should suggest that contemporary Carnival is far from being the poster boy of reactionary conservatism.

#### 6.2.3.4. Negotiating gender

This theme deserves an investigation of its own. Here, I will touch on it very swiftly, to acknowledge the issue in relation to women's emancipation.<sup>175</sup> Gender was and is clearly at stake in Terceira's Carnival. Melo noticed that as Carnival moved indoors, female participation increased.<sup>176</sup> However, she does not go to the extent of claiming that there is correlation between the two: after all, Terceira's Carnival began to boom some ten years after Portugal's emancipation from the *Estado Novo*. Thus, gender equality and political freedom went hand in hand.

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<sup>173</sup> Severino and Marcelli, *Entrevista com Carlos Severino*.

<sup>174</sup> For a take on Bakhtin, see Richard Schechner, 'Carnival (Theory) after Bakhtin', in *Carnival: Culture in Action: The Trinidad Experience*, ed. Milla Cozart Riggio, *Worlds of Performance* (New York: Routledge, 2004), 3–11.

<sup>175</sup> I fully realize that this might entail a marginalization of the narrative of LGBTQ+ people; unfortunately, when I undertook this research, I was not sufficiently equipped to fully address their issues in Terceira Island. Further research is needed because the topic is clearly hot.

<sup>176</sup> Melo and Marcelli, *Entrevista com Assunção Melo*.

Anyway, it is remarkable that women began to erode patriarchal roles first through their involvement in cultural heritage and only later in institutions. As highlighted by a female secondary school teacher I interviewed, Praia da Vitória's first female major was elected in 2021—almost fifty years after the Carnation Revolution.<sup>177</sup> This alone is evidence of the difficulty of emerging in a male-dominated society.

However, the now well-established presence of women in *danças* and *bailinhos* testifies the socially porous nature of contemporary Carnival in Terceira Island. Although some *bailinhos* preserve an all-male cast because of specific friendship ties or for old times' sake, women tend to be ubiquitous. My informants<sup>178</sup> told me that female participation to the Carnival begin with children's inclusion in the shows. That is, the youngest, prompted by their families, have spearheaded the inclusion of females in Carnival roles. This does not mean that they were used in instrumental ways, but it shows that parents' investment aimed at expanding their offspring's opportunity passed through the filter of participation in cultural heritage—no matter their gender.

#### 6.2.3.3. Negotiating identity

I was unsure whether to use the word 'identity' in the last paragraphs of this work. Identity is troubled notion, and I refrained from using it, hoping to show that various processes are at work in Terceira's Carnival, which are closer to the empirical reality. However, at this stage, it is maybe time for a daring generalisation. I argue that Terceira's Carnival, as it currently stands, is an invaluable permanent identity workshop.

A further example of how Carnival help Terceiran people construct their identities: migrations. Carnival is a strong tool to keep close ties with the expat communities. Carnival

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<sup>177</sup> Anonymous and Andrea Mattia Marcelli, *Entrevista com uma Professora*, wav (Angra do Heroísmo, 2022).

<sup>178</sup> e.g., Melo and Marcelli, *Entrevista com Assunção Melo*.



in Terceira's style is not just practiced in the island but branches in all Azorean communities abroad—especially Canada and the United States. Expats regularly invite over *bailinhos* to perform in their communities and following an inverse trend, set up their own *danças* and *bailinhos* and travel to Terceira to show their pride and love for their homeland (or the homeland of their ancestors).

Yet, despite its strong identarian character, I do not feel confident to fully qualify Terceira's Carnival as a total social phenomenon. However, it bears strong similarities with some versions of this anthropological concept. According to Park, who uses this category to analyse death rites, a "total social phenomenon," which is a concept introduced by Mauss, is characterised by the fact it contains "all the threads of which the social fabric is composed."<sup>179</sup> Additionally, Park defines a total social phenomenon as one in which "all institutions find simultaneous expression."<sup>180</sup>

Taken at face value, such aspects are reflected in Terceira's Carnival. It involves most of the population of the island, and those who do not partake by it either hear of it or experience it as an inconvenience. Moreover, it involves a long list of institutions, ranging from the most official ones, like the Autonomous Region, to the most informal group of friends. It entails all types of goods and services, ranging from transports to food and beverage, let alone costumes, information and communication technologies, and other commodities. It fosters the growth of communities of practice and, in itself, it works like a great community of practice, whose multiple peripheries enable individuals to participate in degree and accordingly

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<sup>179</sup> Chang-Won Park, *Cultural Blending in Korean Death Rites: New Interpretive Approaches*, Continuum Advances in Religious Studies (London ; New York: Continuum, 2010), 1.

<sup>180</sup> Park, 25.

develop different degrees of knowledge and expertise. Thus, because of all of the above, Carnival in Terceira appears to match Park's definition of total social phenomenon.

However, and as a conclusion to my investigative efforts, I recommend a more cautious approach. My point is that Carnival totalizes the community in some respects but, in others, is also a totalizing *construction* by the island. That is, the community tests itself by pushing its limits in terms of resources, organization, and creative power. It does so not just involving everyone and all institutions, but also by *imitating* everyone and all institution in a mockingly, funny, or flat-out scornful way. It is a representation that does not take its content seriously but takes seriously its interpretive efforts. Therefore, given its layers are multiple, I would not dub it a total social phenomenon but a *simulation of a total social phenomenon*. This should reconcile the analytical compliance of Terceira's Carnival with the criteria to identify total social phenomena and, conversely, the creative nature of it as a make-believe activity.

## 7. Conclusions

Over the course of this project, I have stressed on the relevance of Terceira's Carnival as an instrument for its participants to negotiate their identities, values, and to entertain themselves either while making fun of the surrounding world or, alternatively, while crying in front of a tragic *dança de espada*.

Terceira's Carnival is 'educational' in many ways. The most straightforward fact is that, through engagement in Carnival at different levels, each type of participant develops different competencies. For example, critiques exercise their critical thinking, children learn how to use their bodies, men learn how to sew costumes, previously marginalized women take the stage and speak in public, grannies rekindle their lives through social cohesion, and so on.

However, the theoretical concerns illustrated in *Chapter 2* stressed on the importance of looking not just at individual learners, but at the whole community. In this regard, I would like to reiterate some conceptual dyads that so far have accompanied my hermeneutics.

The first one is *learning versus education*. This dyad has been fundamental in distinguishing individuals and their personal experiences from communities to which educational settings belong. Even when the focus is on individual learners, the community manifests itself within their spheres, not just as an external factor in a bioecological developmental model but as a living collective with whom the learner can interact and which the learner can modify.

When engaged in its Carnival, Terceira Island is an educating community. This is patent in its ability to foster peripheral participation, as I hope I have shown in the previous chapters. An interesting aspect is that peripheral participation, as I think of it, is not just a matter of available spaces managed by the community but also a matter of being inclusive, resourceful, and welcoming. In fact, notwithstanding the fact that my empirical research has likely demonstrated that the Carnival of Terceira Island is made up of overlapping spaces, each with

its own participatory gradient, I believe the greatest hints concerning the intangible nature of participation come from the ability of Carnival to accommodate several needs. These have been mapped in *Chapter 6* as different types of negotiation, depending on historical contingencies.

However, sheer negotiation is not evidence of education *per se*. For example, one might just conclude that the Carnival has offered a valuable ‘arena’ for Terceiran people to push their interests over the course of history. That is, ‘arena’ in the sense of Olivier de Sardan: a physical context in which conflicts (or conflict resolutions) take place depending on the clashing values of the stakeholders.

For this reason, I wish to address the possibility of Terceira’s Carnival as an *apparatus*. So far, ‘apparatus’ has been one of the least addressed categories of my study because of what was supposed in *Chapter 3*: that is, measuring the ‘apparatus complexity’ would require an entire new research. Because of that, I elected to operationalize it as a dichotomic variable: it is either there or not. However, another one of my theoretical consideration hinders its detection: the idea that apparatuses overlap with institutions. This bias has already been addressed in *Chapter 2* and *3* in what I hope is a fairly convincing way. That is, in strict Foucauldian terms we should not shy off from labels that have been customarily attached to detrimental things or phenomena. Here, I do not want to claim that things such as technology are neither good nor bad, because I believe that even artefacts are born in a specific social context, which makes some uses more likely than others. However, it is a critical duty and, in light of the ‘Greater Humanities,’ it is an ethical stance to accept that there is an alternative to what Foucauldian historiography has unveiled so far.

Thus, before I attach the label of ‘apparatus’ to the Carnival of Terceira Island, I would like to clarify that such action is meant to be done in ecopedagogical rather than hegemonic terms. This calls for a reconsideration of what we mean by nature and by referring to a supra-

individual realm. Over the course of this study, I have been persuaded that some aspects of the genealogical approach, which I deem excellent to tackle the issues of ecopedagogy, have been greatly misunderstood—and maybe Foucault have not had the time to clarify some points.

The dilemma is as follows. On the one hand, it is accepted that Foucault's notions of power and power and power structure are theoretically neutral. On the other hand, it is also accepted that all his studies, as well as those of other Foucauldians, have aimed at either a deconstruction or a radical critique of the Western (or Atlantic) life-space—which was indeed built upon ideologies it had never come to terms with. Consequently, many (if not all) Foucauldian studies deal with either grim or sombre realities. So to speak, the *Narrenschiff* might look funny at first, but its bizzarro arrangement hides the tragedy of marginalized mentally challenged people. The same goes for *Naissance de la Clinique*, the power of psychiatry, and other 'regimes' of contemporary times.

Of course, such realities are more compelling than others. In the 'Greater Humanities' sense, Foucault is a true humanist because, even if he declared the 'death of Man,' he managed to tackle some of the most distressing ethical issues of European history. However, the scope widens as soon as we direct his critical tools to a new subject matter. If ethically-driven historical analysis unveils issues, education science can provide solutions.

Therefore, I imagined the possibility of a *Narrenschiff* that is manned by perfectly healthy people, who are fully aware of the existential challenges of life. They play this game not to mock people who are authentically mentally challenged but to poke themselves, as if attempting to wake up from a convoluted dream. In doing so, they retain their wits and also manage to make a point about where they stand. A thusly organized *Narrenschiff* does not need to go to far to show them what was their previous ontological placement. Let us say that this exploit does not to reach a point of no return. It is just a moment of serendipitous leisure

and, why not, an opportunity to check where someone stands. In other words, it is the triggering of a feedback process—even though there is no formal delivery of sort but just a series of laughs and peaking emotions.

A *Narrenschiff* of this sort would truly be an apparatus in Foucauldian terms. An apparatus stands to a ‘dispositif’ like an army stands to a war. The former presumes a certain type of mutual relations between parts—something that might remind us of a functionalist view of society. Instead, the latter presumes that such social machinery—e.g., the army—is deployed to achieve a strategic goal. Going back to the *Narrenschiff*, we can detect a strong resemblance between its motley crew and an army of fools.

Additionally, the idea of ‘apparatus’ is grounded on the assumption that it could only be a collective. Compare it with the Foucauldian notion of *technique*, which is occasionally (and mistakenly) translated in English as ‘technology.’ A technique is a procedure for personal use. It tells us of individuals, not of communities. But the intentional *Narrenschiff* I was talking about... is made of a different fabric than mere techniques.

This makes us understand that an *apparatus* is an inherently ecopedagogical concept because it catches Gadotti ideas that the wholeness is an ontological reality of its own. Of course, the existence of apparatuses as collectives entails that some individual needs might not be catered to. From this sheer fact stems the misunderstanding I mentioned before, concerning the dilemma between the seemingly theoretically neutral character of the apparatuses and the fact that most research revealed their role in producing grim ethical realities. However, overlooking individuals is precisely one of the characterizing aspects of supra-individual wholes. In this sense, an apparatus can stand to us like we stand to a mosquito, or a single cell. Of course, existentially speaking, the thought is daunting. However, ontologically speaking, there is no inherent evil in the existence of supra-individual (social) realities.

As anticipated for artifacts, this does not mean that *apparatuses* are inherently neutral. Far from that. A functioning system produces outputs, no matter the individual. That is the case for apparatuses. An army could help in an earthquake relief effort owing to its logistic power and, at the same time, it could also contribute to the defence of civilians. However, its very existence and management depends on a small set of paradigmatic assumptions, which includes the idea of a force that is capable of deploying lethal force.

This means that some apparatuses might see the light in an ethically crippled way, and these biases (or dooms) their future. It does not matter how well they are deployed: at some stage, they might default to their originally intended functioning—given sufficiently extenuating circumstances.

Now, I would like to return to the example of the *Narrenschiff* manned by perfectly sane people. In my allegory, such ship is the Carnival of Terceira Island. Like the ship whose cruise I described early, it helps its crew negotiate their social ontological positioning. The ship does not need to go too far: just *sufficiently* far to give a glimpse of one's own standing. Be it the troubled air carrier company or the member of the parliament who got hit by a bucket of paint while visiting Terceira, these institutions and people do not need to go too far to see where they actually stand, and the same works for troupes and audience. The feedback process—i.e., the evaluation—is sort of guaranteed while, at the same time, entertainment can be profited from in full comfort.

At the end of *Chapter 6* I defined the Carnival of Terceira Island like a simulation of a total social phenomenon; now I have compared it to a *Narrenschiff* manned by a perfectly sane crew who fakes being mad—not because they do not know better, but because they need such spark of feigned madness to achieve ontological displacement.

The feedback process, here, is inherently educational. In other words, Terceira's Carnival scores high both in terms of practice and in terms of situatedness. Actually, it both a *situating*

apparatus (because of its ability to produce ontological displacement) and it is also a *situated* apparatus (because its very structure requires its participants to be up to date with almost everything is going on in the island and abroad). This way, it works *also* a functioning educating apparatus—both for learners and for the communities they belong to. Not because they end up reading the news or learning how to sing, but because, by engaging in Carnival, they learn how to ontologically displace themselves and find a new balance in life.

In this respect, the contemporary *mestre* could work as a further allegory of Terceira's Carnival. It is dressed in fancy clothes, and it dances around the stage. Every time (s)he blows his/her whistle, dancers swap places or a story begins. When the *mestre* is focused on tragic things (*dança de dia*), (s)he waves his sword, which is a sign of danger; instead, when the *mestre* is focused on light-hearted topics (*dança de pandeiro*), (s)he equips the *pandeiro* and dances a frenzied dance. His/her efforts in the entire *dança* overcome in terms of resources and fatigues those of all the other participants. It is not unheard of *mestres* falling exhausted after days of continuous dancing. That is, because being a *mestre* is in itself a supererogatory effort, something supra-individual that could be imitated on stage, but which will never fully overlap with what is meant to represent: Carnival itself.



## Appendix A: Interviews

### A.1. Assunção Melo (1974–)<sup>1</sup>

Assunção Melo, as she is known in Terceira Island, is the Director of the Centro do Conhecimento dos Açores (CCA), which is a long-lasting project of the Regional Department of Culture [Direcção Regional da Cultura].<sup>2</sup> She collaborates with the Centro de Humanidades (CHAM) of Nova University, Lisbon, teaches heritage classes for the University of the Azores, and is an accomplished artist. Together with Luciano Barcelos and the photographers António Araújo and Margarida Quinteiro, she authored *Carnival of Terceira Island: Emotion and Catharsis*.<sup>3</sup>

In her interview, Assunção Melo does not only draw on her expertise of Terceira's heritage but also on her childhood and youth memories, providing a glimpse of what it meant to be a woman in the island.

#### A.1.1. Conversation

AM: "...This is what João Orlando Bretão was trying to do when he spoke of popular theatre. He was trying to make it erudite. To provide an erudite representation..."

A: "Erudition, yeah. Like a legitimization?"

AM: "A legitimization, yes. Raising his friends from the *freguesias*. That is my view of the thing. Popular theatre in Terceira Island is to be considered [...] Orlando Bretão."

A: "You know. In the history of Portuguese literature... is theatre very important?"

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<sup>1</sup> Melo and Marcelli, *Entrevista com Assunção Melo*.

<sup>2</sup> J M, 'Maria Assunção Melo assume a Direcção do Centro de Conhecimento dos Açores', *Correio dos Açores*, 2 October 2019, <https://correiodosacores.pt/NewsDetail/ArtMID/383/ArticleID/17244/Maria-Assun231227o-Melo-assume-a-Direc231227o-do-Centro-de-Conhecimento-dos-A231ores>.

<sup>3</sup> Melo and Barcelos, *Carnaval na Ilha Terceira: Emoção e Catarse / Carnival of Terceira Island: Emotion and Catharsis*.

AM: “Very important. It starts with Gil Vicente.”

A: “And do you know when the Carnival moved from the streets to theatres, to *salões*... what did the people perceive? Did they explain it in the same way Bretão did?”

AM: “When Carnival moved from streets to theatre, it was because of two reasons. The first one is that *freguesias* had Philharmonic Societies. As you know, every *freguesia* wanted to have a stage and an audience. However, as I am telling you, the first reason is weather.”

A: “February!”

AM: “February and March. They moved to theatres because it was hard to enjoy weather conditions on the streets. The *danças de noite* had already become *dança de salão*. People, and the richest of the *freguesia* in particular, began to open up their homes and host them at their place. But the *dança de dia*, which was the main one, had always been on the street. And it would mobilize many people too: dancers, actors, and players of string instruments. That is a lot of people. And they used to move from one *freguesia* to another. The earliest change in the movement of *danças* was represented by public transports. [Performers] would be carried around and perform on the streets. But since it was cold, *salões* were built.”

A: “I have evidence of the usage of cars and lorries after the Forties. Is that information correct?”

AM: “Yes. It is plausible. They would dance and move to theatres, because it was going to rain. But this changed the outlook of dances and the performance itself. Because dancing on the streets means joining dancing and marching. Do you know what a march is?”

A: “Yes. So, this changed the structure of the dance?”

AM: “Definitely. At the same time, it got more comfortable. Because you can sit down and watch. You can arrange a lot of things: the quality of the sound, the lighting...”

A: “The scenery...”

AM: “Exactly. All of that would be unthinkable when dances took place on the streets. That is, because there is no access to electricity on the streets, there is all the issue of the weather, and even all the issue of girls and women: the way they dressed, the way they acted on the streets. So, back then, men would perform female roles. Even in the *dança de espada*. And when women began participating in the Carnival, it occurred when it had already become more comfortable.”

A: “And if I asked you a date... when did women began taking part in the Carnival?”

AM: “Difficult to tell, and I will explain why. [In my research] I have found different dates. First of all, not the participation of women but of girls: the first females [to actively join Carnival] were children. They started *danças de meninas* [girls] and *de rapazes* [boys].”

A: “Female... but children.”

AM: “Way later, with April 25 [1974], the role of women in society changed. And this is all tied to the role of women in society.”

A: “1974?”

AM: “Yes. Before that, there were some women around Carnival, but few in numbers.”

A: “Do you remember anything specific? Do you have some early childhood memories?”

AM: “I was born in 1974 on the island. I have already spoken about that in different interviews. The very first time I saw the topic of domestic violence being dealt with publicly, was at the Carnival show. In a *dança de espada*.”

A: “Can you repeat that?”

AM: “Well, I was in the audience, as a child. And I saw a *dança*, and the topic was domestic violence.”

A: “On the street?”

AM: “No. At the theatre. It was already in a theatre. And it was important because even if nowadays we talk a lot about domestic violence, in the 1980s. And so, the 1980s were a time

in which theatres could address specific [taboo?] topics: drugs, AIDS... In fact, at the theatre, they would speak of everyday things.”

A: “Now I got it. Domestic violence was included...”

AM: “In the subject. *Danças de dia* would deal with religious, historical, or tragic themes. Stories of kings and queens. But the *dança de espada*, as you have seen, deals with everyday drama. Hence, domestic violence, drugs, AIDS, disability... Even disability. For example: a girl without an arm.”

A: “Well, I saw a girl without an arm in 2020.”

AM: “It must be the same woman I am talking about.”

A: “More girl than woman... well... to me, she looked 25 or 26.”

AM: “Then no. The one I am talking about was already old when I first saw her. If I remember correctly, it was not normal to see people with disabilities on stage.”

A: “Were they subject to some type of censorship?”

AM: “More like a social censorship. Well, as you know, our Carnival has two associated aspects: tragedy and comedy. Some people believe tragedies should be performed only in Easter.”

A: “I spoke with a professor who told me... that he does not attend *dança de espada* because it is sad.”

AM: “Look, people who get out of a *dança de espada* need to cheer up a bit. They need something contrasting. Otherwise, it is only: comedy, comedy, comedy, comedy... But without drama, comedy cannot be fully enjoyed.”

A: “And what is your opinion about that?”

AM: “[*inaudible*] The dance of Terceira is *dança de espada*. That is the main one.”

A: “The main one.”

AM: “The other ones are cheaper and easier to organize. Of course, a *bailinho* or a *comédia* are less logistically complicated. So there must have been a reason why *dança de espada* survived in Terceira.”

A: “Can you tell me something about the UNESCO recognition? If there were to be a UNESCO recognition, would *dança de espada* be the only one worth listing?”

AM: “Well, UNESCO World Heritage List applies to the urban structure of Angra...”

A: “But I heard that someone is trying to include Carnival as well...”

AM: “It is still an ongoing process at the Regional Department of Culture. It enjoys some recognition, but only at a national level.”

A: “I saw the Portuguese listing. But is it something that will be done in the future?”

AM: “I have no control over it.”

A: “But I am interested in your opinion, because you know Terceira’s Carnival very well: is there a *need* to preserve Carnival and have it certified at a universal level?”

AM: “The Carnival of Terceira Island works only if it is left free. If you try to regulate it, it does not work. The Regional Department of Culture subsidizes dances. They began with people who found financial support in the city but with the requirement dances had to be in quatrains.”

A: “Quatrains?”

AM: “As in poem, with rhymes. I believe Carnival must be free, because it is immaterial heritage. And I believe there is intangible heritage only when there are different generations that want to keep something free. You cannot have it fixed.”

A: “I know this question is possibly difficult. But, in my experience, I saw that when a certification is issued, it means that the practice is about to disappear...”

AM: “This is true for intangible heritage as well. With tangible heritage, it is all black or white. But with the intangible one, you cannot force it to follow a scheme, because as soon as you grasp the scheme, it is already an element of the past.”

A: “I spoke with some people, and they told me that the history of Carnival changed a lot during the Twentieth Century. At the same time, however, they would swear this Carnival is very ancient...”

AM [laughing]: “It is no older than the Nineteenth Century. This festival, the way we understand it, became stable in the Nineteenth Century.”

A: “There are things that occurred beforehand...”

AM: “Yes, but they are other things. But the two wings of Carnival mirror the two wings of a ceremonial procession. In the Sixteenth and Seventeenth Centuries, we have evidence that processions used to feature dances and acting. They would represent a religious subject.”

A: “Also, in the Sixteenth and Seventeenth Century, regulations were issued for performances on the streets.”

AM: “In the Nineteenth Century, the Carnival dances, or *danças de Entrudo* became fixed traditions. But this is no different than *sãojoninas*: they date back 1980s. They are no older than that.”

A: “Well, the Carnival of Venice as well. It is a reconstruction of the 1970s, because in 1920s and 1930s Venice was understood by the government...”

AM: “As a touristic location?”

A: “Nope. As an embarrassment. Because it was all dirty, and it was an industrial city. There was even a project...”

AM: “To clean it up?”

A: “No. To fill in all canals. Therefore, Venice was preserved only because the government had no power to actually drain all the place.”

AM: “Now that you tell me, I remember of another thing. The Carnival of Angra used to be a dirty Carnival.”

A: “Dirty? The urban one?”

AM: “It was urban, and dirty. There is a series of newspaper articles I saw, which try to educate the people who participated Angra’s Carnival. Think of the *batalha das flores* [battle of the flowers]. It was characterized by a lot of brutality.”

A: “When I read the books of Carlos Enes, I saw he described the evolution of Carnival as a process of social change. To me, he looks like he entertains a vision that is choral but, at the same time, opposes urban and rural elements—which is typical of social historians of his age. Well, it is also a socialist interpretation of a rural popular movement that opposes the urban bourgeoisie. The latter, says Enes, tried to control everything that happened on the streets. That was in line with the spirit of the ‘great ordering’ that took place in France in the Eighteenth Century.”

AM: “Yes. That was the Enlightenment.”

A: “A bourgeois Enlightenment. But what is it that you think of such distinction?”

AM: “Such dichotomy?”

A: “Yes, the dichotomy.”

AM: “The *danças* of the *freguesias* did not take place in the city because they were... despised. Starting with the 1980s, *danças* began to be performed in town as well. With the earthquake... the earthquake was a rather sad moment, so it was used to cheer up the atmosphere. Here, in Angra, it took place in the stadiums. It was a way to rekindle the spirit of those affected by the earthquake.”

A: “So, Angra welcomed *danças* in a time of emergency.”

AM: “Yes. Beforehand, Angra’s Carnival was very bad. People would roam the streets and throw around all sorts of dirty things. So, a historical attempt was made to make people throw

water... and flowers. Hence, the ‘battle of the flowers’. And... well... here in the Azores we are on an island that was not contaminated much by other carnivals, such as the Brazilian one.”

A: “And now?”

AM: “Well, now there are all sorts of arrangements. You see the girls dancing like...”

A: “Like a Carioca Carnival?”

AM: “Sort of. And you can see it in Mainland Portugal, in Torres Vedras.”

A: “Is there contamination by the media?”

AM: “Well, we have our own identity. But it is not *that* ancient. This standard of *dança* is not very old, but it is sufficiently identarian [to be relevant]. The same could be said for Pico Island.”

A: “Pico?”

AM: “Now Pico is trying to follow through. But this has always been Terceira’s business.”

A: “But how comes scholars believe there is not always continuity?”

AM: “The main reference is the theatre of Gil Vicente. And there are other types I told you about.”

A: “I need you to assess this theory of mine on the dichotomy between urban and rural areas. Normally, we speak of bourgeois areas versus poor or rural areas. But here it seems to me we have a distinction between areas where there are regulations and areas where there is more freedom. You know, I need a clarification on such topic.”

AM: “It is not easy to discuss this. You see... Angra is a well-regulated city. A Renaissance city. It experienced a lot of naval traffic, with its related wealth. I am from *freguesia*. And when I used to stay in Angra—and even in Lisbon—it was always as if there was another world. And the others would tell me: ‘You are from the mountain.’ That is what they used to



tell me: 'You come from a parish.' And they would call me in the way Angra people call those who come from *freguesias*."

A: "Which years are we talking about?"

AM: "The 1990s."

A: "The 1990s!"

AM: "Yes. It is a well-entrenched habit [to call people like that]. Nowadays it occurs less frequently, because many live in the *freguesias* but work in Angra. But in the 1990s this happened."

A: "Is there a specific example you want to make?"

AM: "This one. 'You are from the mountain.' Do you understand, A.? It was used in a derogatory way."

A: "Derogatory. And how did you feel?"

AM: "I would ignore them. I had my own self-awareness. I was not the first one to study in my family. My family had a long experience, for example, at the University of Coimbra."

A: "So it had its own network?"

AM: "Yes, a network. However, other people without such... *background*... would be discriminated against."

A: "They were more vulnerable."

AM: "And this was not the Carnival. This was everyday life: the dichotomy: *freguesias* vs. town."

A: "Let us talk, now, about education on the island. Is there something you can learn at the *freguesias* and not a school? Something like values, principle, skills..."

AM: "This is very important. You should know something about Carnival and emigration. We have these [Azorean] migrant communities in America. The second and third-generation

migrants learn Portuguese as they participate Carnival dances in Terceira's style (or as they come to Terceira)."

A: "I would love to travel to Canada to see that."

AM: "Canada and the United States. I have contact with Ormond there. That's why I am talking about this: I carried out data collection on the audio and video recording of migrants when they come here for the Carnival. That is the oldest archive in Terceira concerning migrants. I had an anthropologist who did that, in California. Pictures and videos taken by migrants when they visited Terceira Island.<sup>4</sup> And there is a *dança de Carnaval* in Angola, by [Azorean?] soldiers who were there to fight."

A: "Overseas?"

AM: "Yes, overseas. You know, a *dança* is *always* a learning process. Not just because you learn how to speak Portuguese. You need to learn the steps. You need to learn to interpret the feelings of the audience and the stage and how to present oneself in front of an audience."

A: "Reading, presenting, and managing?"

AM: "For example, managing a stage. But I will make an example: someone on stage could be the best piano player we have. However, there is stress involved, because he is going to play in his own birthplace. Overall, what is he learning? He is learning a way to *perform culture* [*exposição cultural*]. Public exhibition."

A: "And are there people who, after Carnival..."

AM: "That is what I always say. People, there, learn how to speak spontaneously in front of an audience... because they learnt it at a *dança de Carnaval*. It is a form of learning that occurs freely."

A: "Is it a public competence?"

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<sup>4</sup> Partially inaudible. Alternative version: "taken by migrants who had left Terceira Island."

AM: “A social competence. Have you ever been on stage?”

A: “Me? In my life?”

AM: “Yes.”

A: “Yes, yes.”

AM: “Did you train?”

A: “Not really. But I have investigated live-action roleplaying games in Italy. People involved in science fiction or literature, who do not just exhibit themselves, but act.”

AM: “Isn’t this a case of Greek rhetoric? People learn as they perform: how to read, how to speak...”

A: “Other experiences, for me, were speaking in TV or doing theatre as a kid.”

AM: “There is another thing I want to talk to you about. Carnival as inclusion [*integração social*]. You should know that in general society there is also marginalization: of families, of people, of groups. Entering a *dança* is a way to feel included. Once the son enters a *dança*, it is as if all the family became included in the process. It is a factor of social inclusion. Imagine the children from a family with social vulnerabilities. By entering the *dança*, the family gets involved: they carry their child at the *dança*, they talk to others, etc. There is a great factor of social inclusion [*inclusão social*].”

A: “So, the uncle plays an instrument, the kid performs, etc.”

AM: “In this Philharmonic Societies play a prominent role. They carry out the first recruitment [*inaudible*]. Some people began playing violin *just* for the *dança de Carnaval* [laughs]. Just for that.”

A: “Music for the sake of Carnival, not music for the sake of music.”

AM [laughing]: “Music to exhibit in Carnival.”

A: “Is there a social goal that motivates learning?”

AM: “Yes, there is motivation. And which motivation? It has something to do with weather and gathering together.”

A: “The harvest?”

AM: “Not harvesting; getting together. Carnival provides a type of cheerfulness [*alegria*] that is important before the time of Lent. It is a period that goes from Christmas until the beginning of Lent. It is an important moment for the soul and for learning. People learn how to play and act, to perform and to be included. But I have to confess you I have never performed in a *dança*.”

A: “Never?”

AM: “Never. But one day I will try, when I am old. To feel socially included.”

A: “There is all a process of preparation, arrangement, and dialogue with other. Let me check my other questions. For you, what type of direction should take a study on Carnival?”

AM: “The study of Carnival? We need to make a *good* inventory. A good archive. Similar to the one that was prepared for the national accreditation [as intangible heritage]. There are lists, but they are inconsistent.”

A: “Maybe you need regional funding.”

AM: “It is full of photographers, for example, but no coordination.”

A: “There is also a multiplication of media. And if there is no continuing archive, then there are people who randomly upload everything on YouTube, etc.”

AM: “I will make a specific example, here. Have you seen a *dança de pandeiro* and a *dança de espada*?”

A: “Yes. 2020.”

AM: “Recently, then. Well, you should know that a *dança de espada* changes as it moves from *freguesia* to *freguesia* [during Carnival days]. This is not recorded, not written, not

analysed. It is recorded, now. However, we do not enjoy a systematic work of recording and analysis of all the changes that occur.”

A: “Does the structure change?”

AM: “The structure of the *dança* does not change. But the usage of space does. The way to address people changes, as well as the steps. And the closure as well. [draws on a piece of paper]: you see, here? There is a circle.”

A: “There is a transformation, from *freguesia* to *freguesia*?”

AM: “Rhythm changes. And people lose strength as they keep performing in different *freguesias*. This might be recorded, but nobody ever wrote anything concerning such phenomenon. See? There are things that are being done in a *freguesia* and not in another. We really have to preserve materials on the dancing part.”

A: “The dancing.”

AM: “Yes, because dancing is gradually disappearing. The ‘popular theatre part’ has already been explored. But the dance?”

A: “But does the Museum of Carnival have something?”

AM: “Concerning the dance? It has some videos, yes. Concerning *espada*... If you have time, you should work on that.”

A: “I would love to.”

AM: “Everything here is called ‘dance:’ *dança de pandeiro*, *dança de espada*... Also *bailinho*: a ball, a dance. People, nowadays, pay a lot of attention to actors and to their lines and contents. But the dancing part is going missing. The movement. That is what we are gradually losing. That is why a study is necessary: because we have already lost a lot. We began losing it when Carnival moved into *salões*: dance use to occur on the streets, as the wings marched around. Now it is all constrained on a stage. And we also began losing it

because of the introduction of orchestra instruments: saxophone, brass, trombone... People playing string instruments used to dance way more.”

A: “It is easier with strings. And... talking about institutions... what is the situation of the Regional Department of Culture? Or are there other Institutions that get involved? Are there regulations? Subsidies?”

AM: “There are subsidies, yes. It is as I told you: Carnival is free; we cannot limit it. If we regulated it, there would be an uprising [*levantamento popular*].”

A: “What about the relation between Carnival and other feasts?”

AM: “There is a theatre company in Porto Judeu that performs regularly. Do you know the tie with Carnival?”

A: “No. But of course there are all those philharmonic societies....”

AM: “Somebody tried to organize a Carnival for tourists. But it did not work.”

A: “It did not work?”

AM: “It did not. I will tell you. [reads some lines from one her unpublished papers, concerning the critique of tourism]. You might want to look at that.”

A: “Are there political movements that try to capitalize on Carnival?”

AM: “They try. They *try*.”

A: “But is there popular resistance?”

AM: “There are people who wonder. Who is going to profit? Those who cater for tourists?”

A: “I was asking because, when I was investigating *touradas à corda*, somebody told me that there is indeed some business to do for the *ganadeiros* [managers of breeding farms].”

AM: “There is business here as well. Clothing, venues, pubs, hairdresser, transports. I undertook a study...”

A: “You studied that.”

AM: “Well, it is unpublished. Here, in the section on Hélio Costa: there is a business, here. Writers are paid, for example. The only ones who do not profit, economically, are the audience or those who dance. In the case of the Carnival for tourists, the only ones who profited were tour agencies. But performers did not get anything out of that.”

A: “What about accommodation?”

AM: “Imagine you are a tourist.”

A: “Well, I *am* a tourist, to some extent.”

AM: “No, but that is different. Imagine you are a real tourist, and I am the agent. I ask you 50 Euros to take you there and watch a *dança*. You paid me 50 Euros. That is an example. So, I get 50 Euros to take you there. But the *dança* is going to perform anyway, so the performers get nothing.”

A: “They get nothing.”

AM: “They get nothing! Also, because they get subsidized only if they perform in Teatro Angrense or Ramo Grande. Otherwise, Philharmonic Societies get funding through the sales of beers and *bifanas* [pork and beef schnitzel sandwiches]. But if I make you pay me to take you to the Carnival (e.g., in February) and make you sit down in a theatre... you do not pay a theatre ticket, because it is free.”

A: “So, it would be an exploitation. But during feasts, usually, there is a process of investment and returns for the community.”

AM: “Here as well.”

A: “It does not have to be economical.”

AM: “But there is *also* a profit. Some people used to film the *danças* and sell tapes. Now it is all online. I remember that there used to be individuals who would produce a lot of tapes. And participants loved to buy them.”

A: “As a souvenir. Your explanation is very clear. We were surprised by the Carnival because it bore differences with other European Carnivals. In the mainland, in Italy, there are historical theories concerning the evolution of Carnivals, but we are aware that what we see now is a reconstruction. For example, my supervisor made me aware of the fact that in Southern Italy there are the so-called ‘Anthropological Carnivals,’ which are called this way because they are being re-constructed after someone who wrote a Master’s thesis on the topic, for example.”

AM: “Well, here you do not see a reconstruction. There is sufficient continuity. Have you noticed, here, in 2020? How the young people love to participate?”

A: “Well... I would like to ask you. Is there a relationship between aged people and the youth? Is it more natural here or is it my impression?”

AM: “There is nothing rational, however. There is this feast: *dança dos idosos* [the dance of the aged people].”

A: “*Dança dos...*?”

AM: “*I-D-O-S-O-S*. The elders.”

A: “I heard about that, but I have not seen it.”

AM: “Well, in these dances, the aged people travel through the *freguesias* with younger people. They are recruited to support them [the elderly], to sing...”

A: “Does it take place on stages?”

AM: “Yes. And there are children as well. Have you seen them?”

A: “I saw a *bailinho* with children only.”

AM: “That is the *bailinho* of Biscoitos. Did you like it?”

A: “It was very nice.”

AM: “How many have you watched?”



A: “Well, on my first day I attended *danças* in Altares and Biscoitos... and Serreta. On my second day I stayed in the same place—Doze Ribeiras—and watched *all* *danças*. On my third day I went to a *freguesia* very close to Lajes... a small one...”

AM: “Juncal.”

A: “Juncal! There, I saw *dança de espada*. The preceding week I spoke with César Toste.”

AM: “Ah, César Toste. I interviewed him as well for my book. Well, now we have done one hour. Would you like to see me later, next week? I will be pleased to have you join me as I introduce a class to visit the Palace of the Captain. Do you know the Palace? It takes place on Friday. You can come with us. It is not intangible heritage, but you will like it.”

A: “Wondreful.”

## **A.2. Carlos Severino (36–45 years)<sup>5</sup>**

Carlos Severino is a teacher of classical literature at the Escola Secundária Jerónimo Emiliano de Andrade. He also teaches Portuguese language at the evening school of adult education.

### *A.2.1. Conversation*

A: “General question. What are the challenges of teaching in Terceira?”

C: “The challenges of teaching in Terceira?”

A: “You opinion...”

C: “I have to think... There is an advantage in teaching here with regards to the Continent. That is, discipline. There are not to many cases of undisciplined students here. The few ones are kept under check. In the Continent, we have schools that are very violent, with people that hit each other... the hospital... the ambulance, the police are there every day for some reason. I spent five years at a school in the Continent as part of my teacher training induction. I was always worried. My situation now is different... Discipline is an advantage. The teacher role is respected here, and that side of discipline is ensured. What I am noticing here is a global uninterest for what concerns school. Students do not have an interest about school. They are interested with what happens on their computer, or on their social networks at any given time. We already had this problem with the teenagers. Bullying on social networks and violence has a different strength and wears a mask. This school we are in does not have much of a drug problem. São Miguel has a bigger problem in this sense. Here there can be at most one or two cases. Here we have different activities. There are classes... for adult education. Moreover, there is this advantage of teaching in both, which allows to cross information and

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<sup>5</sup> Severino and Marcelli, *Entrevista com Carlos Severino*.

understand what is what. But the biggest issue is the loss of interest, the loss of curiosity, which is generalized... A generalized apathy..."

A: "Apathy..."

C: "What I was saying... The challenge here is to know what they [the students] want. Here, high grades are demanded. We are so focused... that we work [them?] to the limit."

A: "Is this only a part of students that works that much?"

C: "[inaudible]."

A: "[inaudible]."

C: "Life projects are another thing. That is, we have many students who have a life project. Nothing concerning subsistence, though. The goal is that of helping their parents. On the fields, with the pasture, with the cows. And even here there is being held a discourse of professionalization in this field. And there are even more intriguing ideas. In one of the last classes that graduated there is a student whose family created organic milk for the Milhafres company in the Azores. So it was an idea..."

A: "Was it the first family to do so?"

C: "It was. The first one to produce organic milk. With such idea, it was him who left from here, then went to his family. So he had a clear idea [a life plan]. But other students do not have a clear idea of what they want to do, so they attempt to get high grades all across the board. Their average grade is excellent: 19 or 20 out of 20. Those who, instead, know what they want to do, they are aware that the required average grade [to enrol in their tertiary course of choice] is very high and they try to get higher grades as well."

A: "When you talk of 'course,' you mean 'university degree'?"

C: "Yes. University degree. When we work with students that do not aim for anything and are not interested in anything, it is more difficult to work. Since they have no goals... For example, we may fix a goal for them: get to the end of the year without negative grades. This

is a feasible objective. For us it is a short-term goal. For them, it is a long term goal. But the entire point revolves around this issue: why are they here? They are here because they are compelled to. Schooling is compulsory until 12<sup>th</sup> Grade, that is, 18 years of age. Therefore, I would be way happier, ideally... because what I do is also teaching evening courses for adults and often times I hear: ‘Had I known it before, I would have kept studying when I was younger. And now I am 50 and am completing high school’.”

A: “Do you teach classical literature in evening classes?”

C: “There is just adult education in the evenings.”

A: “Are these basic literacy courses?”

C: “No. It is an equivalent of the secondary school. Secondary schooling in Portugal is Grade 10, Grade 11, and Grade 12. Three years. At night, what is being done is a number of hours—480 hours—more or less... spread in two years.”

A: “So it is like a catch up course?”

C: “Exactly. It is not a certification or assessment of competences. These are the same classes you would have during the day, delivered daily for two years—from 19:00 to 23:30. It lasts two years.”

A: “So why at night?”

C: “Because they work during the day. The pupils did not have an opportunity before. Some people got to the age of fifty without going above Grade 6 or Grade 8. Because it was not compulsory to go above that. Then they entered the workforce and now... they need to complete Grade 12. They need an equivalent qualification. Level of work at companies has risen.”

A: “So basically, to attain a certain level at work (e.g., pay level, or role), they need a secondary degree...”

C: “Exactly. Grade 12 is the minimum threshold. Moreover, we have people—younger people—who are 25 or 26 and who had not finished secondary school with a desired grade. So, they try to repeat their 12<sup>th</sup> year of education. But there is a great difference, here. That is, because these ones need a final grade... Suppose they had 8.7 out of 20. They were awarded 9. But this grade is not enough to get the diploma. It means that, if they sit a recruiting competition for public office, they get a penalty. For example, they do not get points [in the recruiting process] unless they got *at least* 10 out of 20. For example, I have two [evening classes] pupils: one who is currently working as an accountant for a company, and another one who works in real estate.”

A: “How many people are we talking about, at night?”

C: “Well, there are always two classes. This year we have a first year class and a graduating class. Every year is the same. We do not do more than 40 people overall. Here, in this school... We used to have 150 per night. Now it is more sustainable. Also, because there are provisional policies concerning Covid. So, there are limitations to the number of places. 40... plus another 40: here you go; 80 students at night.”

A: “Thank you. That is very interesting. You know... I was reading a book at the library and it said that the Azorean youths think of school as a gathering place and not as a place of knowledge. What do you think of that?”

C: “The students I know... Some acknowledge that it is a place of knowledge, but what they prefer is meeting their friends. For example, do you know about the post-Covid statistics? September last year [2021] they asked students if they wanted to go back to school, and why. Here in the Azores we have no idea because the research was not carried out here. But in the Continent, the response, especially for the youngest (first cycle, until 12, 13, 14 years old), was that they wanted to go back to school because of their friends. As a general information, this is what I got. In the secondary cycle, the school is understood as a place of knowledge.

But they do not see such knowledge as something practical and, as I said, as something interesting. For example, if we taught videogames, they would be more interested.”

A: “Way more?”

C: “Yes. Because the school is offering things that are not out there, in society.”

A: “Do you mean you got those courses?”

C: “No. It was a hypothesis. But we are trying to raise engagement. For example, we started a club of robotics. To enter robotics... there are many who want to know more. They have an interest in computers and mechanics. The school is working to make these club work.”

A: “There are many clubs of robotics in Italy as well.”

C: “Here there are Regional fundings. São Miguel won a national prize.”

*[Interruption, as Carlos goes to fetch some water]*

A: “That was the most difficult question. Now I will ask the easiest one...”

C: “The advantages?”

A: “Well, there are areas in which students have greater interest and expertise...”

C: “Well, there are things that could be both an advantage and a disadvantage. There are two sides of this coin. In the island, more or less, everyone knows each other. Therefore, relation with parents could be very good or, at the same time, it could be difficult. For example, there are parents that undermine the work of teachers.”

A: “Fathers, or also mothers?”

C: “Both. The greater number is mothers.”

A: “Typical.”

C: “Yes. You will see that it is usually the female figure of the family that is responsible for raising the children.”

A: “What are the issues, there?”

C: “They interfere. We interfere with family life, and they interfere with school life.”

A: “What type of interference? Do they attempt to dictate the curriculum?”

C: “Not quite. It is more about trying to get higher grades for their children. Occasionally, they disagree with content. Etc. But there are, in my experience, very good parents, who know the situation very well and keep things separated. School is school; home is home. They are very people that are committed in their children education, but they do not undermine teachers. These work *with* teachers, and help. This is helpful because you can tell parents that their child is sleepy at school, should go to bed earlier, so that the parents can take measures to ensure that their offspring performs better at school.”

A: “Is there an opportunity to choose subjects?”

C: “No. There is a State curriculum.”

A: “I thought the Azores Autonomous Region had the autonomy to choose 25% of the curriculum.”

C: “Well, that is a *specific* project. The project called *Autonomia e Flexibilidade* (AFC). They have it in the Continent as well. Everything that starts in the islands has its origin on the Continent. Azores decide whether to follow through or not.”

A: “*Autonomia e Flexibilidade*...”

C: “Curricular. But this does not take place in secondary school. It takes place in the secondary cycle of *primary* education. Grades 5, 6, 7, 8, and 9. This subject here, is integrated in the curriculum and exists only in the Azores. It is specifically from here. And it is a subject that did not exist in the Continent. It has always existed in the Azores. But then there is what you were talking about: 25% of the curriculum is flexible—and this comes from the Continent. You know, in Secondary school... they are preparing for finals.”

A: “I see now.”

C: “All the country is involved. Finals are required to access university education. Here, there is autonomy, but not in this specific aspect of the curriculum. That I know, we do not talk of

[inaudible] in Secondary school. Secondary school is Grade 10, Grade 11, and Grade 12. Three years.”

A: “So Secondary school is standardized. But beforehand, is there more freedom?”

C: “Yes, but in the subjects that are not required to get to secondary school: Portuguese language and Mathematics.”

A: “Only two?”

C: “Yes, in Grade 9. Then there are other things that take place in other years, like PISA tests. But that is all right. Grade 9 focuses on Portuguese language and mathematics. Meanwhile, if, for example, a student who wants to [inaudible]...”

A: “I am sorry. I did not quite get what you mean.”

C: “Grade 9 exam weights on the final assessment. But this was changed with Covid. Grade 12 exam is not compulsory. Only in 2022 and 2021. In March they informed us that it was not compulsory. Therefore, this year, and the past year, Grade 12 exams are only taken by students who desire to utilize those grades to access university. But the Portuguese Language exam, normally, would have been compulsory no matter the university choice. All students of Grade 12 used to take Portuguese Language and two other exam subjects. For example: Portuguese and History, and Philosophy. Portuguese, Mathematics, and on Grade 11, they would have sat the exam of Biology. That’s the combination.”

A: “So all Universities have limited spots available.”

C: “Yes. They combine the average grade of students throughout Grade 10, Grade 11, and Grade 12 (or Grade 10 and Grade 11 for subjects that are completed in Grade 11). This is averaged with the grade in the national exam. Now, to access Portuguese Universities, the minimum threshold is 9.5 out of 20. This year, because of Covid, starting with March 2020, they took only the exams they wanted. So we had two classes: one of science, of which only 12 sat the exam, and one of humanities, of which two did not take the exam.”



A: “But will this new system be preserved?”

C: “No. It is temporary. In fact, even this year we expected to go back to the usual. But at the end of March, the provision was extended. We received an official communication from the government. Let me search [*searches on his phone*]. It was March 17, actually [*he shows an article to the interviewer*]. Here you go. In March 17, I was saying, the Grade 9 exam was not going to be included. And in Grade 12, students could choose the exam. But as you can see, Basic School [*Ensino básico*] has three cycles...”

A: “Can we go back talking of advantages?”

C: “Well, advantages of being here. It is very quick to intervene. Bureaucracy is easily overcome. Discipline is another advantage. Then... there is the context of Terceira Island itself. Everything is close-by. Everything is nearby. Andrea, you must have already noticed that we are close to university.”

A: “Proximity.”

C: “This unsettles students who go to the Continent.”

A: “Unsettling?”

C: “Yes, because here the longest commuting time is one hour. If they come from Raminho, for example. One hour is not a lot. But, for them, it is a lot. When they get to Lisboa, it takes one hour, one hour and a half. They all try to live near the university, because it takes a lot. I try to explain this to some of them, but they do not get it [*until they begin living in Lisboa*]. But in a local perspective, the dimension of the space is another one. Here for us who come from the Continent, everything is nearby. For students, everything is far away. Moreover, here there are young people, interesting people. And some students are both interesting and interested. Some have a lot of critical thinking going on. They ask questions unrelated to the subject matter. They care for the world, and follow what is going on. They have an interest in the subjects for their own benefit. But, in particular, they pay attention to what is going on in

the world. For example: Ukraine war. People see news... or listen to music and ask questions on the artistic process. They have this type of interest. At home, in their domestic context... but they pay attention, ask questions. And this is motivating. However, on the other side, they chat a lot. They talk a lot. Secondary students are very immature.”

A: “Immature? In relationships?”

C: “As well. But it is a generalized immaturity. They have childish behaviour. Like children. And this impacts their decision-making. For example, to carry out a process from the beginning to the end. Advantages and disadvantages of an issue.”

A: “And is this a general situation?”

C: “Not only in Terceira. I came here 8 years ago, beginning with 2015. What I saw... the difference, is secondary students used to be careful, with an adult behaviour, etc. But now I have secondary students that act like children. They are not uneducated, but they are like overgrown children.”

A: “So they are children that are 1.80 m tall!”

C: [*laughs*] “1.80 m and 8 years old.”

A: “I would like to ask you about your origins... and your first contact with a Terceiran tradition.”

C: “I come from the Continent, yes. But which of the many traditions you mean?”

A: “Well, if I could choose, I would say Carnival. Unless you have other memories that you feel are stronger for you.”

C: “I adore Carnival. When I came here, 8 years ago, the first impact of Carnival... well, I arrived in September and Carnival was in February. I had no idea what it was about.”

A: “There were no studies on it?”

C: “No. At the time—well, in general terms, I do not like Carnival.”

A: “Me too. But I came here.”

C: “Would you like some blank paper?”

A: “Thank you, I appreciate.”

[*fetches some white paper for the interviewer to take notes*]

C: “I do not like Carnival. Well, I liked the idea of masks in Venice. I was 22 when I got there. But since then I did not really follow through. But once I came here, *obviously*, I was curious about many things. I visited the Museum, the Library, I toured the island to get to know it. I attended all conferences at the Museum, at the City Council, all the book presentations... I went to Praia da Vitória at the house of Vitorino Nemésio. That is, because back at university I had studied at the faculty this book by Nemésio, called *Mau Tempo no Canal*... but reading it is a thing. Seeing it yourself is another thing. And when I first heard of the Carnival, a friend of mine, at the time, we were having school break for Carnival—Monday, Tuesday, and Wednesday. So, this friend explained to me that Tuesday, Mardi Gras, was not the most important day of Carnival. It begins on Saturday. So, we realized it was Friday, Saturday, Sunday, Monday, and Tuesday. So, what did we do those days? We had no classes. So, on Friday we organized a dinner in a *casa de pasto*, a traditional house, with traditional food: *enchidos* [sausages], *morcelas* [black pudding sausages], *linguiças* [another type of sausages], *batatas doce* [sweet potatoes], *caldo verde* [green soup]. We were in Posto Santo. And the house was there [*points at a square on the paper*], and the church was just across the road. And next to it, there was a *salão do carnaval*. That is where I saw my first Carnival. There were 20 of us and we kept having dinner. After that, I was told we were going to see a *bailinho* in that *salão*. Coming from the Continent, I thought they meant *bailinho* as in ‘dancing,’ maybe on the streets. But when we got there, I realized it was full, full, full, full, full of people. And we managed to squeeze in. You know, Terceiran people do not have too much of an accent, but to be popular, during Carnival, they use a stronger

accent, more old-fashioned. So I attended a *bailinho* and did not get even half of what they were saying.”

A: “Well, so you did not get it? Because they used a different pronunciation?”

C: “I could not understand it. Their pronunciation is exaggerated, to be popular.”

A: “So is it like a comedy thing?”

C: “Not really. They use an old-fashioned pronunciation. An ancient one. [*Inaudible words with ancient pronunciation, then he rephrases in current Portuguese*]: ‘*o gato-pingado embaixo de esquerda* [*lit.*: the tabby cat at the bottom left; *metaph.*: the undertaker at the bottom left].’ Let us say that I understood one thing for another. And when I got close to the wall, I saw a girl looking at me.”

A: “A girl?”

C: “There was a girl, with her father nearby. And she greeted ‘Hello.’ The father noticed. And told her: ‘These are Portuguese people from the North.’ And she said: ‘If you need help, I can help’. [*laughs*]. ‘If you need help.’ And then: ‘I can help’. And then we left Posto Santo. We saw only one *balinho*. The place was very small, very hot... a lot of chaos. And then the following day we went to a way more interesting hall, which is that of São Bento. There are two São Bento: the new one, at the top, and the old one, at the bottom. We went to the old one. And when we got there, we managed to get in; seats were booked. You get to have your lunch, your breaks. And there, I happened to see the same *bailinho* that had been staged in Posto Santo. But this time I understood.”

A: “You understood them acting?”

C: “Already, yes. The first time you are a stranger, then you get used to it. And then I began understanding all the dynamics concerning Carnival. They begin preparing in November for February. All the costumes. Somebody writes the lyrics; others write the dance. Then there is rehearsal... There are Philharmonic Societies: many play an instrument. Therefore, Carnival

is a *huge* process. It is a *humongous* thing. Four days to visit all the theatre halls, back to back. So that, Saturday, I spent there from 18:00 until next morning. I wanted to see everything.”

A: “I did the same, when I went there for the first time. 14 hours.”

C: “Yeah. You sit there. You take a break. You have drink...”

A: “Then you can witness other ones coming by.”

C: “And people sit there, you know, with notepads. And they write down the performances. And they talk to you and say: ‘Well, this group was better last year.’ Or: ‘The music is better in this one.’ And basically you have people who write a critique and evaluation of each *bailinho*, each year. [*laughs*] Year by year. They evaluate costumes, staging, improvisations, garments. All that. For example, in that *bailinho* I saw in Posto Santo, when I saw it later being staged in São Bento, one of the actors, during the presentation, interrupted a presentation to talk to someone in the crowd: ‘So, you are here? It haven’t come here in a long time...’ Everyone was laughing. But the fact is that it was not staged. He had just seen someone in the audience he knew, and began asking how he had been.”

A: “So everyone thought he was improvising something?”

C: “Yes, yes! He had a conversation. And the other actor insisted he got back into his role, and everybody was just laughing at that. Because he interrupted his acting after seeing somebody he knew. Or, for example, there was a part of the play that changes depending on the preference of that specific theatre hall.”

A: [*laughs*]

C: “In São Bento you must say things one way. In Ribeirinha you have to tell them another way. In São Carlos you say it another way. In Porto Judeu another. And so on. Moreover, there are some lyrics that are exceptionally good. When I got to São Bento and watched an entire *bailinho* from beginning to the end and a *dança de pandeiro* from the beginning to the

end, a *dança de ferrinho* from the beginning to the end—I realized where it all came from. This Carnival is rooted in the theatre of Gil Vicente (1465–1536). There is all a bibliography about that. There was a seminary concerning Carnival with my professors, at university. And finally, I saw it, real-life, how a play by Gil Vicente would look like.”

A: “But how comes there are historians who believe that there is a root in Gil Vicente’s theatre, yet they write that we have no evidence on historical continuity...”

C: “True. We have no evidence of historical continuity. But here is what we know: the plays of Gil Vicente were always staged with music. There was always an introduction to the plot. The introduction would explain the rest. Everything was in rhyme and in verses. It would be either sung or sung and played. The staging would be all in verses. Gil Vicente would also be critical. Most of his plays are plays of social critique. The actors would criticize: politicians, police, etc. Here, it is the same. When I saw a *bailinho* from beginning to the end, I realized I was watching Gil Vicente. And I asked myself: how is it possible for it to be preserved here, after such a long time? From what I read, there have been changes [to Terceira’s Carnival]. The staging did not use to be made in a theatre, but open air, on the main square by the church.”

A: “On the streets?”

C: “No. On the square by the Church. And Gil Vicente used to do it in court, at Dona Leonora’s palace—or anyway, indoors. There are several things that got changed. But you know, the plays are always very actual. They are way more innovative. They talk of what occurs in the United States or contemporary characters, like ‘the Minions.’ [*inaudible*] Or other characters. That is like the avant-garde of the *bailinhos* of Carnival. They preserve rhyming, music, but they do something more contemporary.”

A: “Like the Os Rapazes das Doze Ribeiras?”

C: “Like them, yes. And then there are others—there are worth it.”

A: “But is the *Dança de espada* as critical of society [as *bailinhos*]?”

C: “No. It is a tragedy. Formerly, there were more *Danças de espada* than *bailinhos*. The goal was to prepare for the Lent. *Danças de espada* always stayed the same. It is a tragedy, which however works out well in the end thanks to the intervention of our Lord Jesus Christ. Hence, here is one of the *Danças de espada* I saw: there was a father, a doctor, who did not believe in God, and whose daughter was tetraplegic and in a wheelchair. And when he starts believing in God, the daughter starts walking. Simple as that. Nowadays, *Danças de espada* are way less represented. As a play, it is way longer. It takes up to one hour, on average. And it requires many more players. Not just six or seven *violas*, but almost an entire orchestra. And it requires a lot of quality costumes. So, it is a *dança de carnaval* that is much more expensive. Talking money, it requires greater investments. In the old days, the *Dança da espada* would be staged with the idea of preparing the people for the Lent. Then, it was realized that it was *long*, dramatic, tragic, very theatrical. *Bailinhos* came [as an intermission to *danças de espada*], with comedy that would animate the entire situation. And then, the situation was inverted. Well, there is always at least one *Dança de espada*, which is obligatory. There are two groups in Praia da Vitória. They alternate every year.”

A: “With Cesar Toste.”

C: “Yes. It is expensive, but when staged, many people would attend. It is worth going out. So, we have a historical perspective here, which makes *Dança de espada* part of the heritage.”

A: “Do you think that there is some learning *during* Carnival or *during* the preparation of Carnival?”

C: “Both. During the preparation... it is all a great get-together [*convívio*]. Preparing... Get there, organize everything. They are very active. And the preparation is a great get-together. For all Terceira, it is a festival. So, they meet regularly to prepare lyrics, but also to eat, and

drink together. They start in December, but many things have already been prepared. Then they try out their costumes, they try out the music, they take care of the lyrics, they train to play music...”

A: “And dine, and drink.”

C: “That is at the base of everything. But they would usually do that after dinner. So they would leave home at 21:30 to go to rehearsals. Until 23:00.”

A: “So far, I only know what I saw. I was at a rehearsal and then there were drinks, and food...”

C: “A get-together. With friends.”

A: “But you know, Andrea, when they do the *bodas* of the Holy Ghost... this season [May], they do about the same. At 20:30 people would gather for ‘*rosário terço* [one third of a rosary]’<sup>6</sup> and then they would eat.”

A: “The rosary?”

C: “Yes. The rosary is open to whoever gets in—whoever comes. Then they have food. After the religious part, there is always the prophane part—the get-together. Carnaval is the same. It is the same in a *tourada*. If the *tourada*: they come to see the bullfight on the street and then they celebrate. In this island, everything boils down to that. It is inevitable. [*inaudible*] When people are gathered around a table, there is a freedom—a freedom of speech—with no equals: around the dining table we are all equals. Certainly.”

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<sup>6</sup> An integral rosary is composed of four crowns. Each crown is divided into introductory prayers, five ten-prayers blocs (*Ave Maria*), and final prayers. The ten-prayers blocs are always preceded by a *Gloria Patri* and followed by a *Pater Noster*, together with the announcement of one of the five mysteries pertaining to each crown. The mysteries presiding each crown are divided into: Joyful, Luminous, Sorrowful, and Glorious. However, since the Luminous mysteries are optional, the standard length of a rosary is three crowns. For convenience, each crown could be recited in a different day of the week—making it a “third of a rosary.” For a historical appraisal of the Rosary, see John Desmond Miller, *Beads and Prayers: The Rosary in History and Devotion* (London: Burns & Oates, 2002).



A: “Around the dining table, we are all the same.”

C: “Yes.”

A: “And during Carnival... do you think there is some learning going on? Information?”

C: “Well, I believe that the first thing one learns is from the subjects, but also to be critical of what is put on stage. Whether it is about the island, the country, or the World. It is obvious, for example, that next year [2023]—we know that already—there will be talks on stage concerning war in Ukraine. Not being a regional subject, it is guaranteed that the Ukrainian flag will appear in a *bailinho* and Putin will appear in another one. Why? Because Carnival takes the main topics of local, regional, national, and international society. All together. Ready.”

A: “You know, when we talk together, I already think of an interpretation, which might be wrong: that Carnival has an ecosystemic view of what the World is like.”

C: “Go search everything. When Trump was elected in the USA, there were Azoreans that agreed with Trump’s ideas... and there were others who even voted for him, because they had American citizenship.

Think of *bailinho* renowned writers, like João Mendoza [starts laughing], or even Alamo Oliveira... but let us say João Mendoza is the one with such vision: that Carnival should criticize. Not just critique, but high-end critique: a critique that adds a value to what it criticizes. I have already seen *bailinhos* like that online. First of all, his *bailinhos* are perfect and wonderful in terms of rhymes and verses. The first *bailinho* I saw was because of the ‘incident of the national pantheon’ [*panteão*], and the *bailinho* featured the characters portrayed in the national pantheon, debating and criticizing political choices and everything that occurred in Portugal. It was a wonderfully written *bailinho*.”

A: “How do you write *panteão*?”

C: “It is like *pantheon*.”

A: “Thank you.”

C: “He [Mendoza] raises the stakes. It is not for all; it is for few. I remember a text concerning the old hospital. It was in ruins and, after years, nobody had fixed it. He would address everything: the old hospital the lighting on the streets, the dirt on the beach. And everything would be crammed in two or three words, with great critical capacity.”

A: “And if there is a mistake or a *faux-pas* by the national or regional government... they put it in the *bailinho*?”

C: “Absolutely. It is not a subject... not the main subject. It could be a single verse, a comment, a line. This is something that people would grasp. Since the *bailinho* is rehearsed in January, lines have already been written, by December.”

A: “Now, I see.”

C: “But even if something happens in December or January, the author still manages to squeeze a couple of lines to make a reference to the incident. So, he actualizes his play of popular theatre. He activates a system in the audience, by triggering stored memories. And such relation is ensured by a cross-reference. There is no need to specify it any further. I talked a lot. But, you know, I really like this Carnival!”

A: “You like it a lot, eh?”

C: “I saw some *bailinhos* on-line [because of Covid-19]. You can watch them at Angra’s Theatre. When I arrived on the island, they were not being hosted in the main theatre. But now they are. The year I bought a ticket for *bailinhos* in Angra’s theatre... but there was little to see.”

A: “I understand your point. Many people told me about a certain competition between the city of Angra... well, not a competition... but the fact that having a *bailinho* in Angra is an addition—not the main destination. Angra’s theatre is not part of the original touring programme.”

C: “Well, now you have a mobile app that tells you when and where to go. But Angra’s theatre has things that you will never see in *salões*, and vice versa.”

A: “It is an official theatre.”

C: “Two years I went to Angra’s theatre [to watch the Carnival]. So, the first time I got myself two tickets for two days. The advantage of Angra’s theatre is I can book my seat. In *salão* you have to guard your seat... or find somewhere else to go. Also, Angra’s Theatre broadcasts online. And I have met people who prefer to watch Carnival at home than in the *salão*. Why? Because in São Bento, for example, acoustics is very bad. Meanwhile, people prefer to watch the show later at home than in the *salão*. Well, the benefit of *salão* is you can buy a beer, a *bifana*, some crisps... Instead, Angra’s Theatre is not a *salão*. It is a proper theatre. There are, of course, other *salões* that do something different. For example, in Ribeirinha the Carnival is done ‘backwards.’ There are tables and people sit at the tables to have dinner and, at the same time, the show is on the stage. It looks more like Sãojoaninas. They have dinner in the theatre. That is why I believe food is indispensable. But, for me, the great comfort of Angra’s Theatre is that you have a booked seat. Instead, in São Bento...”

A: “You stand up to go at the toilet, and you lose your seat.”

C: “Exactly. There are no reserved seats. For example, in Porto Judeu, they tried to introduce tickets. I do not know if it was meant to support the Philharmonic Society or to control the number of people entering the *salão*...”

A: “Well, I saw that there might be insurance issues. I mean you have a public space like a *salão* and it ends up hosting double the number of people that are listed as its standard capacity. Do you understand this point?”

C: “I am not sure about that. However, I know that there is a commonsensical way to manage seats. For example, you take turns with the people standing. And people do not get angry

about that. Another challenge is that many people who go to the *salão* is not interested in the *bailinho* but spends time drinking.”

A: “Are there similar things that happen on the Mainland?”

C: “Not that I know. I know there are Carnivals in Mainland Portugal, but nothing like this.”

A: “And you would define it *popular theatre*... not *dance*?”

C: “There are both. *Dança* has a fixed choreography. It is not spontaneous. For example, in Northern Portugal, Carnival is a masculine initiation. In Torres Vedras there is a tradition of masks. Here there is another Carnival, which does not look like the other ones. If anything, in Loulé there is a Carnival similar to that of Brazil: with dances on the streets, allegoric chariots... But it is different. Wait, there is another thing I want to add: people here keep moving. They change *salões*, *bailinhos* go from one *freguesia* to another. I have never heard of a Carnival in the Continent in which the audience moves so much. Also, in other Carnivals, lyrics are not as prominent and there is less critical intention. Theatre implies interaction with the audience. There is dancing and singing, but I believe interaction is due to the text. There is no Carnival without dance and music. Carnival makes everyone equal: the doctor, the worker of the street, the driver, the old man who plays the guitar, and the school student. All people are mixed because the Carnival groups are very heterogeneous. Social background does not matter. What matters is what you can give to the team. I remember once I was watching a *bailinho* and I was trying to identify people I knew. And there were many people I knew: teacher colleagues, members of the Regional Council, my own students, other students I had seen at evening school, and basically I crossed path with everyone. There was no group linked to a specific social class. Maybe age: there are group of boys, of girls... all right. But not the rich and the poor.”

A: “Heterogeneous.”

C: “Very heterogeneous.”

### A.3. Eugénio Simas<sup>7</sup>

Eugénio Simas is the director of the Philharmonic Society of Biscoitos and is both the music teacher and the mastermind behind the *bailinho* of children, which gathers students from the Primary School of Biscoitos. What follows is an excerpt of a longer recording, whose physical support was unfortunately damaged during travel.

#### A.3.1. Conversation

E: “What should I say? I have been here for 20 years and always took care of children. At first, there were no real *danças* [by children]; maybe one or two. But, in the past 14 years, I have managed this experience: the *bailinho* school. It is a dancing activity with the youngest. Starting with Grade 4. But I did many other things for Carnival: the elders, other *bailinhos*, etc.”

A: “And did you organize it?”

E: “For them? 14 years. Previously, children would participate, but each in their own group, with adults.”

A: “For example, the *bailinho* of Biscoitos?”

E: “Well, here we have our own group [in reference to the EBI school]. *Bailinho* began and we began to have the youngest practice dancing. We started with a group of volunteers. [inaudible] Now it is children only.”

A: “Do they play instruments?”

E: “No, they do not play. They act and play the tambourine [*pandeiro*]. You know, when I rose to my role [1992] there were few *danças de pandeiro* around. It was declining. You know, there are *bailinos* or *danças de varinha*—you know what *varinha* is? It is a stick—but

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<sup>7</sup> Eugénio Simas and Andrea Mattia Marcelli, *Entrevista com Eugénio Simas*, wav (Biscoitos, 2022).

the *dança de pandeiro* requires at least one, if not two or more, *mestres do pandeiro*. So, we have *bailinhos* and *danças*...”

A: “And many *danças* had shut down?”

E: “They did not shut down. They *transitioned*. From *danças de pandeiro* to *bailinhos*.”

A: “But why? Because it is difficult?”

E: “Because it is difficult to play the tambourine. And it is expensive.”

A: “Expensive?”

E: “Yes. Costumes are more expensive.”

A: “Like *dança de espada*?”

E: “Yes, yes. In a *bailinho*, you can improvise costumes. But you cannot with *dança de pandeiro*. [*inaudible*] Consider setting up a *dança* with six *pandeiros*. But our *dança*, with children, has up to six *mestros*.”

A: “True indeed.”

[E shows the dance on his computer screen]

E: “There are two, the youngest. Then the older ones. It is normal to have one or two *mestros*. Three is already rare. But six? Ha, we have six!”

A: “So that is your innovation.”

E: “And it already changed a lot.”

#### A.4. Francisco dos Reis Maduro-Dias (1953–)<sup>8</sup>

I encountered Maduro-Dias thanks to my contacts at Escola Secundária Jerónimo Emiliano de Andrade (*o liceu*). Members of the school management team insisted he was *the* man, given he had acted many roles related to cultural heritage on the island. However, at the time I did not have a clear picture of whom my interviewees were going to be since most of my contacts were gathered through a snowballing technique. Only later, while carrying out bibliographical research on the Internet, I realized to what extent his career was intertwined with the cultural life of the island.

Biographical elements might be useful to understand some statements of the interviewee, which relate to decision-making processes at some institutions of the island. Additionally, Maduro-Dias agreed to be publicly named but specified that what he told me were his personal opinions and memories and might not represent those of other colleagues and collaborators. All the following details are gathered by public websites.<sup>9</sup>

From 1987 to 2000, Maduro-Dias was director of the Gabinete da Zona Classificada de Angra do Heroísmo, which was set up to ensure the historical centre of Angra do Heroísmo kept meeting the requirements for the UNESCO classification; this entailed making decisions on the restoration of buildings' façades and retaining the overall appearance of the neighbourhood. From 2001 to 2003 he was president of the Historical Institute of Terceira Island [*Instituto Histórico da Ilha Terceira*]. From 2002 to 2005, he was director of the Museum of Angra do Heroísmo and, after that, retained the position of head museologist. As an invited teacher and professor, he enjoyed an ongoing commitment with educational

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<sup>8</sup> Maduro-Dias and Marcelli, *Entrevista com Francisco dos Reis Maduro-Dias*.

<sup>9</sup> Instituto Histórico da Ilha Terceira, 'Galeria de Presidentes', Institutional website, *IHIT - Instituto Histórico da Ilha Terceira* (blog), 30 May 2022, <https://ihit.pt/pt/galeria-dos-presidentes>.

institutions such as: Universidade dos Açores, Escola Superior de Enfermagem de Angra do Heroísmo, Seminário Diocesano de Angra and various schools of vocational training [*ensino profissional*].

#### A.4. Conversation

F: “As you know, here in the *liceu* I was professor of History, and professor Anthropology, and Social and Cultural History of Portugal. Since the beginning, I noticed that there is no—well, there *was* no—and I think that there is still little connection between what is taught at school and what is lived and practiced by the community. So, I decided to go through the Museum and, from the Museum, I started other activities among the community as I was acting Director of the Restoration of the Historical Heritage Site of Angra, which is part of the UNESCO World Heritage. And again, I ascertained that, of such architecture, to the engineer or to the member of the local City Council [*administração municipal*] [the idea of] ‘culture,’ broadly construed, is not the ‘erudite’ culture of music, of literature, of painting. Culture is not considered a relevant element in making decisions.”

A: “Back then or still today?”

F: “Even now, to a little extent. It is very easy that no value is given to the traditional festival of a small community: the government, a city council, or whoever, might decide otherwise in a meeting. Nowadays there is much more awareness due to the relation between the tourism industry and cultural traditions and festivities. However, the knowledge of the fact it is necessary to respect such moments [of festivity] derives from the need to maintain an event that could be used for touristic purposes and *not* because it is, properly speaking, an event that belongs to one’s own identity.”

A: “Because there is another usage, which is not community-oriented?”



F: “Yes. Because there is a bus, because there is a moment in which visitors arrive and one must welcome them kindly. But the community has its own life. The school is the school. And that’s it. When... Well, I am talking in general terms...”

A: “General?”

F: “Yes. I am mixing tangible and intangible culture. Models, paradigms...”

A: “But there is always an intangible usage of tangible elements...”

F: “Yes. As someone who has worked in a museum for about forty years, I do not like the concept of intangible heritage. It is clear.”

A: “Is it a recent categorization?”

F: “And it is an artificial one! When I have that [*waives in the direction of the window*], it is because I want to see, because I want to read...”

A: “Because there is a function to it?”

F: “Because the intangible justifies what is tangible. Hence, the material alone is just glass and a frame and a handle. A window entails light, internal lighting, protection, desire to watch out. Do you get what I am trying to say?”

A: “Absolutely.”

F: “Therefore—I do not like it very much—that is what I am saying about tangible and intangible. Because I have always been annoyed when I was being asked elements of the cultural heritage that could be used at school. And I would say—to whomever—‘well, that is because we believe we have things of culture to give explanations to students only when it is time to teach history.’ But heritage does not have to be about history. It could be [used in] physics, geography, geometry... If I have twenty-four tiles of wood on the inner part of a church’s roof: two dozen, two tens plus four, three lines, twenty-four rectangles.”

*[The conversation is interrupted by a friend of the interviewee, who greeted him as she was passing by. She offered to come back with coffee]*

F: “Where was I? Therefore...”

A: “The usage of material objects...”

F: “The usage of objects belonging to the community. I do not understand why... I mean, this is an introduction to our interview...”

A: “Of course”

F: “I am immensely curious to see how teachers, with current resources, relate themselves to tangible and intangible cultural elements: festivals, components, objects, things. That is, because when they lack assistance to explain... Please understand I am trying to create a bridge between what is without the school and what is within the school. And I can talk to you of what happened in the good ol’ times.”

A: “When resources are missing...”

F: “I will tell you, because I saw that. We did it here [*he touches the chairs we are sitting in*]. It is easy, apparently—I do not know why—maybe because of the teaching system our teachers grow in, at university. They worry a lot about passing over knowledge but are not equally worried about structuring the knowledge resulting from experience, by putting together information.”

A: “They are not constructive... I mean, in the sense of the constructivist paradigm.”

F: “Exactly. There is no... Well, I underwent teacher training [back in the day]; I am not like that, but I will explain this to you. When I ask a question, I try to arrange the question to complete it by myself with my information. We have colleagues here who claim—but I do not know if they do what they say. But let us recap.

The public administration, with regards to cultural heritage, thanks to the influence of the tourism industry, understand that some cultural ‘thing’ should be preserved to show them and to enable visitors to remark, and to enable restaurants to sell and show. But to say that such

cultural elements are... let me say... not even 'structural'... to even say they are 'barely important' to the political decision-making... that is rarely the case.

Think of this road [*points at the road*]. We are used to play pranks on the streets. It is not even a proper bullfight [*tourada*]. You know? There are bullfights in the arena [*praça*] because we have an arena.”

A: “Yeah, I know. I know.”

F: “We have rope-bullfights [*tourada à corda*]. For a rope-bullfight the road must be emptied. The places where [street] bullfights are done...”

A: “Are they closed off?”

F: “More or less. That is very interesting, because it is a workable idea.”

A: “I saw one, last Saturday.”

F: “There is a line [*risco*], then another line, then another line [*gestures with his hand, to show that there is a series of lines on the ground*]. The two primary lines are the most important ones: holding hand with the children, we stand behind the two lines because for all of us that is like a very strong barrier that will not be breached. And yet it is small line [*um risquinho*]. It works because the ‘herdsmen [*os pastoers*]’ secure everything and have techniques to ensure safety. And yet it is [just] a line [on the ground]. Now, the pavement could be straight. Nowadays, the Urbanistic Board, the City Council, or other Institutions, say it is necessary to create something else to make transit possible; [when they build a road]they create a passage, they create a getaway. It is not so difficult to accomplish. But when the ground is very irregular, it is more difficult to escape from a bull when we are on the street. And so that is how they think [how their mindset works]: street usage is regulated by law. Width for vehicle transit. Width for pedestrian transit. Height, gradient, right curve... they do not care. If there is a bullfight there... if there is a bullfight with more than 200 people attending...”

A: “I see your point. So, it is the bullfight that changes its ways to fit to a publicly regulated space.”

F: “The bullfight can keep going. But the worries [of institutions] end with road rules. [In urban planning] they do not worry to make the space and the road surface suitable for bullfights. It is the bullfight, which is 150 years old, that should adapt itself. It is not asked of the road to respect the bullfight. The bullfight has to respect the road. It has to respect a car that is less than ten years old [*laughs*].”

A: “That’s very clear. The Freguesia Council [*a Junta*] takes the precedence. Public order takes precedence over...

F: “...over traditional culture. Clear.”

[*F’s friend comes back with coffee. She talks of the fact the school received funding for the construction of a new room, connected to the library*]

F: “Thank you, thank you. She is a colleague of mine who also works at the Master on Nature and Heritage [*Natureza e património*], University of Azores. When I used to manage the *Gabinete* [Board for the Angra do Heroísmo Heritage Site] I began to think: ‘we should reverse this.’ And there was a Master. I had contacts with agronomists and biologists. [*inaudible*] But the Master course was very curious because nobody—almost nobody—in almost thirty years... All of us were professionally engaged with the community. It was a very peculiar Master because there were mathematicians, law professors, geographers, historians.”

A: “Interdisciplinary...”

F: “And the very principle behind it will give you [teachers] an opportunity to discuss land management in an interdisciplinary way.”

A: “An integrated application.”

F: “Exactly. And [the goal was] not really of making just another admixture of circumstantial knowledge.”

A: “Was or *is*?”

F: “It depends on the number of students enrolled each year. The Master is available when there are more than ten students. We can sum the students of different years, so if there are five or six attending one year and another six enrolments for the new year... then the Master takes place. A Master is always available, but it is activated depending on...”

A: “...enrolments?”

F: “Yes.”

A: “You know, I gave a lecture in this Master, in 2020, when I was asked to introduce my university. I do not recall which faculties it involved. Nowadays it concerns the Faculty of Education, which now has moved...”

F: “To São Miguel.”

A: “Yes, Ponta Delgada.”

F: “I do not like that. Because that is another context. Here, one of the good things [*inaudible*], which I would like to deal with, is clarifying the concept an islander has of the world. It is a work that I would love to undertake. With islander, I mean the result of a dyad between the land and the sea, and the sea is part of the organization of the developing territory. For a continental like you—but it could be an American, or else—the sea is something that stands by the side and that we visit during summer, but which does not belong in an absolute and permanent way to the world. And it is very difficult to explain that to those who are not islanders, because the world... well, I rearrange my world according to the dimension of the available territory.”

A: “Well, this is central to my investigation, because I have to distinguish elements. I do not deal with natural ecology *per se*, but with elements that are negotiable: we can change them

in the short-term. And there are also non-negotiable elements, such as physical geography or some aspects of the past.”

F: “I remember a book—not a novel, but a memoir—by someone who was prisoner during the war in a very limited jail setting. This individual was staying in a *piccolo*, in a small cell. With no information on whether it was day or night. And he decided, to avoid going completely crazy... he decided to organize his day starting from the moment in which the meal was introduced in the cell.”

A: “Well... a frame of reference.”

F: “Sure. Each day he would pick a corner. He would sit there, in almost total darkness. He would touch and feel around him. He would think. New meal: new day. So, he switched corner. And he managed, at the end of several weeks acting this way, to feel *saudade* [longing]—you know what *saudade* is, right?—he felt longing for returning to *that* corner in which there was some irregularity on the wall, some feature, a detail that was different [from the other corners]. Hence, he had a feeling of *distance* towards something that was in a place less than two metres by two. So I began thinking about that because when my friends from the mainland ask me, they usually ask me if, as an islander, I feel myself trapped by the sea. And I answer: ‘no.’ Subsequently, I began to notice that I go to Praia da Vitória, which lays 21 km from Angra, when I have to attend a meeting or when I have to take a flight to travel. Otherwise, six months might pass, and I never go to Praia. On the other side of the island, that is, Serreta, which is a traditional place where there is a Pilgrimage in September... a year may pass without me going there. And, concerning Biscoitos, which at the North of Terceira Island, I belong to a society that is called Brotherhood of the *Vinho Verde* [green wine]... we have a weekly meeting. But before that, I would spend three or four years without going to Biscoitos. Therefore, I discovered that, for myself, I had created, I had expanded, the

psychological distance that was available to me—even though the physical distance was negligible.”

A: “It sounds like a conceptual expansion of physical space.”

F: “Exactly.”

A: “You like it?”

F: “It is the perfect definition.”

A: “Your ideas are very deep.”

F: “Have you visited Graciosa, which is way smaller?”

A: “Nope. I have only visited Terceira so far.”

F: “In Graciosa, or in Corvo... Corvo is 16 square kilometres. The locals would offer me a passage [*boláia?*] to cover a distance of less than 300 metres. One day, I was staying at a hotel, a small hotel, and they asked me if I needed transportation to reach the place where a meeting was being held. And the roads were arranged this way [*he gestures to illustrate how close the two locations were*]: I was here, talking to the receptionist, and near there was the house where the meeting was taking place. Nonetheless, she asked me if I needed a passage to get there.”

A: “She offered you a car?”

F: “Indeed. Because it was far away.<sup>10</sup> And it was not far at all! And that is because they themselves created such distance. Hence, from here to there becomes ‘far away.’ Less than 250 metres.”

A: “When I was attending the Carnival, I saw that it is held in high regard the fact of travelling with a *bailinho* all around the island.”

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<sup>10</sup> Apparently, not because they wanted him to spend money on a taxi.

F: “But that is it! Travel! To *go* and reunited with all other communities. That is not *my* community. I leave *my* psychological and cultural-traditional surroundings and I *go* to others with *my* message and *my* story. [*inaudible*] I go around *all* the island. For three days, it is *other* communities, *other* groups, and it is all the island. But these are *other* communities.”

A: “But isn’t this a thing that began taking place after the 1970s? I have been told that, back in the days, there were no means of transportation and it was hard to take a *bailinho* and perform in other communities.”

F: “That is correct. The distance was higher. It was more difficult to reach another place.”

A: “And is it easier now?”

F: “It is. Many own cars—the majority, at least. The need to visit others and go far away. Well, that is my take on it; I do not possess statistics about it...”

A: “But I trust my informant.”

F: “[*Laughs*] Ah, well... everybody wants to own a car. Not to depend on public transportation. If I owned a car, a moped, an auto rickshaw, it means I could go wherever I want. There is a match with the idea of distance. I remember, when I was a child, that we used to have a house in Angra and the house where I now live, which is a small farm, with some external cabin for tourist accommodation.”

A: “In which *freguesia*?”

F: “São Bartolomeu [de Regatos]. Above São Mateus. São Bartolomeu used to have two shops [*lojas*]. We used to call one of them ‘the saleshop [*a venda*],’ that is, a grocery store. It used to sell a bit of everything except shoes and clothes.”

A: “Food?”

F: “Yeah. Food, ironmongery, paints, cheese, wine... and every week there was a collective transport of goods that would depart every week [from the city] because people only went to Angra if there was no other option. Therefore, the remoteness within the island, in everyone’s



mind was greater because the opportunity to socialize with or visit others was not as big [as in the city]. Going back to what we were saying about *bailinho*...

A: “Excuse me, I have a personal question for you: is the relationship reversed when the physical distance is truly great? I saw that some migrants, in America, feel very *close* to the island. They have feelings... missing the place. In this case, the distance is real.”

F: “I am not so sure. You see... First—and that is always my impression—for instance, I would say that there is ‘an island of the mind [*uma ilha mental*]’ that is preserved within family relationships or those relationships that characterize *that* community. I will reword it. We are currently in the time of the Holy Ghost [*Espírito Santo*]. During the celebrations of the *Espírito Santo*, each *freguesia* has its ritual and set of procedures. It is all *Espírito Santo*; it is all Catholic Christianity; but... here it is done in a way, while there it is done in a slightly different way. It is the same, but not quite the same.”

A: “Is there a shared element and a differentiating element?”

F: “I gave up attempting to understand. Well, one day a person I met from the *freguesia* of São Bras, close to Praia da Vitória... I entered the utility room of the *império* and commented: ‘how nice it is, how goo.’ And the men gathered there, who did not know me at the time, said to me: ‘We are preparing the celebrations in the fashion of Fontinhas.’ That is, a *freguesia* that stands close to São Bras. They implied it was somehow different. So, I was like: ‘But you are close to each other!’ Well, it was the same Holy Ghost, and they were close to each other, so I would have understood if the difference was with Praia, which is not that close... but Fontinhas? [The replied] ‘There are different details. But this week’s Emperor [*Imperador*] is originally from Fontinhas and asked to celebrate in the fashion of Fontinhas.’ He had married a girl from São Bras. And since I was already struggling to understand well all the variants of the island... well, I gave up trying to understand all variants of the archipelago. That same day, I gave up understanding everything: I write what I know; every

day I try to get to know a little more; but the experts are those who live in the *freguesia*. When I have a question, I ask them. And when people ask me, I send for them [those in the *freguesia*], because they are so good at telling differences.’

A: “And do you think that it is the same process of distance-creation?”

F: “Every *freguesia* used to have a shop. Every *freguesia* used to... Well, let us talk about distance. In Pico, I noticed that the custom is that of having Queens [*Rainhas*] of the Holy Ghost. The procedure of appointment of Queens within the celebration is analogous—as far as I remember—to that of the migrant communities of Azoreans in California, which were animated especially by people from Pico, Terceira, and São Jorge... and Graciosa. Meanwhile, I came to know that, *down there*, they had celebrations for the Holy Spirit that entailed the appointment of a Queen.”

A: “And not a King.”

F: “An Emperor... Every place has an Emperor. But there, there was *also* a Queen. And some [migrant] families from Pico, upon coming back [to the island] for the festivities of the Holy Ghost in Pico, organized celebrations that were affected by what occurred in California. After some eleven years, it seems that in São Jorge, which is another island, popped up a celebration involving a Queen... in São Jorge! Of late, I have not heard of it. Why? Because a family of São Jorge, which was living in California, had met a family from Pico, who was living in California as well, and celebrated together. And when they ended up reuniting together in São Jorge to celebrate together, they organized a celebration involving a Queen. Therefore, the relation between the two islands...”

A: “...is mediated by the relation with California.”

F: “...is mediated by the relation with California. People who built new houses—not sure if you saw them...”

A: “They are very American.”

F: “Totally. They are identical to the houses of a person who came back from Toronto and... so you get an identical house in São Bartolomeu. Therefore, sometimes we think the relations are between Angra and Biscoitos, Angra and Serreta, or Serreta and São Bartolomeu, whereas in fact such relations were mediated by the migrant communities. Hence, you got: physical distance, mental distance, what term did you use?”

A: “I believe I said ‘conceptual’, but maybe it was too analytic of me...”

F: “No! It worked well. When I say ‘mental’ I mean the distance is being construed. My concept of distance does not correspond to the [physical] reality of distance. And more: proximity is greater between people belonging to communities here on the island and people from those communities that emigrated. There are two churches, here—one in Altares and one in Vila Nova—that have an American Gothic style. Our traditional churches have a façade and a belltower by the side. Like that [*he explains the disposition of the elements through gesturing*]. But the Medieval English Gothic style, which was later transferred to America, has a central belltower. In Altares, more than 50% of the community emigrated in California in the mid-Eighteenth Century.”

A: “And were there in California imitations of the North European churches?”

F: “Exactly. So, they decided to collect money and launch a project to renew the church of the *freguesia* they had come from. That is why, nowadays we have in Altares an American Gothic church, with a central belltower: because the project was 70–80% funded by the Altares expat community in California. They offered to their homeland a church and the money to build it. Hence, there are different islands in each islander’s mind.”

A: “Were there conflicts or competitions to establish the plan of the church?”

F: “Nope [*He imitates the people of Altares*]: ‘We are creating a new church. The already-existing one is small.’ It is not possible to have competition—I believe—when events unfold this way: all families from Altares had *someone* in California (cousin, brother, mother,

nephew. So, it was not a clash between a group from one place and a group from another. It was the most active branches of each family that had remained in the *freguesia*, which were living on *the other side* [*outro lado* = overseas], that decided to help those who were staying here to build a new church.”

A: “That is a very integrated process, actually.”

F: “Now, let us go back to the question. The feeling—I repeat myself—the school does not use on a regular basis, more because of ignorance concerning possible methods... it does not use... what occurs outside and is not always grasped by one’s own school.”

A: “Is it like the relation between road authorities and bullfights?”

F: “[*imitating teachers*] We are school people. We are responsible for our students. We have to provide them with education on all necessary subjects. And... You know, these are complicated things. But for them, the culture of the community is just an item of information that should be correctly addressed only by integrating it with internal information through the subjects of history, geography, and cultural traditions that are being studied in a specific period called ‘Geography and History of the Azores.’”

A: “It fires through a disciplinary channel.”

F: “Yes. So here goes the reasoning: ‘I have mathematics, I have geography, and so on...’ Well, I should thank you because you are helping me to reflect.”

A: “Well, when we chat there is an opportunity to revise and reflect.”

F: “Exactly. Well, ten years ago... Nope, twenty years ago, in 2000, I used to be lecturer of a subject called ‘Adult Education [*Educação de Adultos*]’ on behalf of the Primary Teacher Training School [*Escola por Professores de Ensino Básico*]. That was a pioneering subject, which was new for the University... This often happens: when my colleagues at University have no one in their group who is sufficiently brave to face the challenge—because it is a strange subject, complicated, unusual, etc. They say: ‘Maduro-Dias, would you like to come

over and deliver this teaching here?’. Well, I reply: ‘I know less than you do. But I have the courage to do so [laughs].’”

A: “There used to be a content-based test, in Italy, to become teacher. Subsequently, circa 2000—or maybe 1995—a teacher school was planned, which entailed education training for teachers, not just disciplinary training.”

F: “I see. At that time, two trainees from *Ensino básico* came to my office and asked my supervision for their final presentation. And they were working with children aged 2–6 years old. They asked if I had any suggestion. I answered: ‘I do.’”

[*Further interruption by a manager, who asks how long we have left. We reply ‘ten minutes’*]

F: “Quickly. That is what I told them: ‘I want to know to which extent do we motivate children with something interesting at school.’ Because here is what I noticed: we have a system of safeguard for the children, which allows fathers who commute to Angra from other *freguesias* to enrol their children at schools in Angra and not in their *freguesia* of origin. And I believe this creates a very curious artificial situation. In their identity cards, the children are marked as residents of—say—Serreta. But in line with reality and daily cultural practice, they are from Angra. And they know very little of their *freguesia*. They leave at 6 am. They start school at 7 am. They come back home at 6 pm: bathroom, homework, TV, bedroom.”

A: “So that life in the *freguesia* is merely residential?”

F: “Only sleeping. Hence, they are in a very difficult situation. Because when people speak of creating a responsible *local* future—I mean, when a public officer or the President of a *freguesia* council, or someone who is involved in the celebrations for the Holy Ghost,

promise things... sometimes they have no idea of the real life of their communities, because part of such community spends most of his life in Angra, about the School Hill.<sup>11</sup>

The two teacher trainees that came to me were, respectively: teacher at the School Hill, and teacher in Santa Bárbara. So, I told them to pick 25 boys and girls from the School Hill and 25 children from Santa Bárbara, and let us have them complete the same task. The question was: ‘Tell me three plants and three animals you know.’ Then we could make a case study and compare... you know what I am talking about. Why did I say so? Because I had the feeling that we were creating strangers in their own land, at least in cultural terms.”

A: “I think that the children that were studying in Angra answered with popular animals from their geography class: lion, elephant... Whereas children from the *freguesia* answered: dog, cow...”

F: “[*claps*] Exactly! Absolutely. The 25 rural children answered: rabbit, dog, cat, hen, rooster, cow. We asked only three, and already we had five or more. Plants? Parsley, cabbage, sage, potato... And there is always some narrative behind that: ‘the parsley I picked up for my grandma who had to cook eggs.’ Plants belonged to a process. And those who, although being legally resident in Santa Bárbara, used to study in Angra: 23 of them (out of 25) had no idea of plant names. Zero. One said: ‘A begonia my grandma keeps at home. Would that be a correct example?’. And a girl said: “Nettle. Because it stings!” Concerning animals, as you said: panda, bear, lion, giraffe. And a student remarked: ‘But that’s natural, because the stories we are told in the kindergarten are stories about the Lion King, about an elephant, about a kangaroo.’ And this is what you obtain: children who know how a kangaroo is born, but which have not the slightest idea of how a calf is born. This means that teachers had no

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<sup>11</sup> *O Alto da Escolas* is the namesake of Almeida Garrett Square [*Praça Almeida Garrett*] in Angra do Heroísmo, where Escola Secundária Jerónimo Emiliano de Andrade is located.

awareness of the type of conscience they were constructing by estranging the children. Since it is easier—and the majority of my colleagues agree—that we have an obligation to communicate to children the world that is *out there* because the community will take care of transmitting identarian cultural values—although they do not make it clear through which process this should be accomplished. Hence, [they assume] the school teaches Argentina and Guinea, while the local community teaches São Bartolomeu and Cinco Ribeiras. What happens is that the majority of the people, which want their children to grow, be different, and know the world, in earnest they have no ‘classes’ on the Holy Spirit.

I was thinking about something else. There is no structured form, evident and powerful enough, to transmit all of the above. And that is what I was going to say—what I was thinking about—it is not by chance that we have, in Terceira Island, fifteen folkloric groups—fifteen—and there are little community groups that focus on the transmission and teaching of traditional values... and basically, they dance and sing, because that is the tradition of the island. But there are fifteen groups that teach folklore and cultural values as if they were schools.”

A: “But is this promoted by the *freguesia* councils?”

F: “No. These are autonomous initiatives of each community. I have the feeling that communities are aware of the fact that values exist, and that they belong to them—even though they cannot identify them clearly—and that such existence is made apparent by specific concepts, values, and things... that they themselves cannot define very well. So, they gather in folkloric groups, they gather in drama groups, and yet they seek formal certification on behalf of schools or on behalf of the community. And the school does not legitimize them—because, for the school, ‘school is school, and they are what they are.’”

A: “So they feel groundless, delegitimized?”

F: “Well, not completely. Let us make an example: a young lad with stylish hair, with a ponytail, wearing jeans... who is totally contemporary... identical to a young lad from Lisbon. Here, at 4.30 pm, he comes back home, changes clothes, and at 5 pm he helps his father to take care of the cows. We have two personas in the same individual. There is a persona when he stays in Angra and there is another one that manifests itself in the local community, when he accompanies his father, when he plays at the *filarmônica*, when he goes to sleep.”

A: “Well, thank you for everything. That was a very important conversation for me.”

F: “My worry was of not being helpful.”

A: “Not at all. You helped me a lot. Truly a lot.”

F: “School... when I used to do training at the school, I was able to come here and push the idea that communities are wonderful places to work with.”



## A.5. Hélder Fonseca Mendes (1964–)<sup>12</sup>

Hélder Fonseca Mendes is a renowned religious man. I contacted him not because of his ecclesiastical role but because of his expertise on Terceiran folklore, which he has studied extensively. He is the author of *Festas do Espírito Santo nos Açores: Proposta para uma Leitura Teológico-pastoral*,<sup>13</sup> and of *Do Espírito Santo à Trindade: um programa social de cristianismo inculturado*.<sup>14</sup> He spoke to me personally and not *qua* member of a specific institution.

### A.5.1. Conversation

A: “You spoke to me about your research on the Holy Ghost [*Espírito Santo*]. At first, there was a difference... bishops used to come from outside, right? And you told me as well that it was up to the local priests to take care of such things...”

H: “Well, it is true that the bishops did not immediately see a value in what was going on, from a devotional level. However, I would not go to the extent of speaking of a conflict. You know, if these families liked to practice such specific tradition, it came natural for priests to take up the role. For example, if a family father became the promoter of a Holy Ghost feast and went to the point of filling the role of *Imperador*, it comes natural for a son, even if he is an ordained priest, not to contradict what was the tradition of his elders. It was his father, after all. Hence, the priest, who still followed the doctrine and abided by the bishopric, would not go against acts of such devotional nature. Hence, fathers transmitted such tradition to

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<sup>12</sup> Hélder Fonseca Mendes and Andrea Mattia Marcelli, *Entrevista com Hélder Manuel Cardoso da Fonseca de Sousa Mendes*, wav (Angra do Heroísmo, 2022).

<sup>13</sup> Hélder Fonseca Mendes, *Festas Do Espírito Santo Nos Açores: Proposta Para Uma Leitura Teológico-Pastoral* (Angra do Heroísmo: Instituto Açoriano de Cultura, 2001).

<sup>14</sup> Hélder Fonseca Mendes, *Do Espírito Santo à Trindade: Um Programa Social de Cristianismo Inculturado*, Biblioteca Humanística e Teológica (Porto: Universidade Católica Portuguesa, 2006).

their children. Therefore, in this Island, the movement took hold... even without preaching. We can talk of some form of 'popular theology' that affects what goes on within a family or within a specific religious community. Suppose you are in another island: you were born there, and there is a specific way to celebrate Christmas or Easter... [*inaudible*] Some fifty years ago there was no school, no university, no Autonomous Region. Therefore, islands were quite—well—isolated. And, as such, they developed their own ways. That is not a general religious dogma but a personal way of understanding a doctrine.”

A: “And do you think this is a form of creativity that derives from isolation? Or from a *feeling* of isolation?”

H: “Deep down, the core is the same. Everyone was quite happy about the Holy Ghost: it is part of the Holy Trinity... People could be uneducated or illiterate, but if they sing for the Holy Ghost and pray the Holy Ghost... Well, in terms of substance, this is all the same. Now, with the cult of the Holy Ghost, here, I am not saying you receive blessings, but it is a way of life that reminds me of the Franciscan spread in Corvo and São Miguel. Islands got different influences, depending on who arrived there first—especially in the Nineteenth Century.”

A: “Franciscans? Not Jesuits?”

H: “Well, Jesuits never really approved of popular traditions. Franciscans were closer to the people. And the people would make use of local resources to organize their own festivals. If they had horses, they used horses; if they had oxen, they used oxen. Instead, Jesuits would not listen to popular faith. They were mostly concerned with science, the elites. Franciscans had a better connection with lay people.”

A: “Closer to the people?”

H: “Yes. Closer to the people, closer to local traditions, closer to the sea, even. Hence, if there is a ‘common substance’ in the islands, it is thanks to Franciscans. Then, in the Nineteenth Century, further change was caused by internal regional migration: people coming

from Corvo and from Pico. There was a fishing industry. Also, there was the influence of migrants who went abroad and then came back with the influence of the United States of America. Late comers, anyway.”

A: “And do you say that here there is unity in the church? Or were other denominations introduced? Is there an Evangelical Church?”

H: “Yes, there is.”

A: “Here in Terceira?”

H: “Unfortunately, I have no relations with it. I know it exists but have no idea what they do.”

A: “So, you told me that the common base is this Franciscan milieu that produced the evangelization of the islands. Afterwards... I studied profane traditions rather than religious ones. But do they imitate each other? In structure? In fashion?”

H: “Well, this distinction between what is sacred and what is profane is not found in the Gospel. This is more of a result of what we do in life: there are popular movements, and more official things. For example, some things are popular because they are performed by the lay people; other things are popular because they are performed by the elites. But we all live in a natural way... and in the natural world there is no real distinction between what is holy and what is not. For example, you see this in the Gospels: there is no distinction.”

A: “No distinction...”

H: “No distinction. Well, but what is interesting is that, in this island, what is labelled as ‘sacred’ and what is labelled as ‘profane’ are indeed close to each other. Everything has a ‘profane’ dimension... I do not know if I can say so...”

A: “I mean, for me, these are analytical distinction.”

H: “I agree they can be analytical. In practice, it is hard to tell the two different things. There are concurrent motivations. Think of the feast of Holy Mary [pilgrimage to Serreta?]. People

take the road for religious reasons. However, there is also a concurrent motivation, a parallel one: it is the participation to a context that, analytically, we call ‘profane.’”

A: “Like drinking? Or dancing, for example?”

H: “Yes. All those things are called ‘profane’ but are part of the feast, nonetheless. A religious feast might host activities that we would normally term ‘profane.’ Music can be profane. Singing can be profane. Food is profane. Dance is profane. Walking is profane! A hug or a kiss? Profane. But this is the ordinary context of a feast. [*inaudible*]. The authors of a *bodo* [donation]—which is our way to say *voto* [vow]—are those who commit to do something, with a solemn promise.<sup>15</sup> It requires a will to do something, which is itself transformed into an act of donation: donation of wine, of bread, of meat. For example, they kill a cow to give everyone some meat. As you see, there is something profane and sacred at the same time.”

A: “Is it normal to have both a religious festival and a *tourada*?”

H: “This is a specific tradition of Terceira Island. Terceira has always enjoyed the presence of *touros bravos*. This triggered an appreciation for *touradas*. In São Jorge, which is the island closest to Terceira, *touradas* are not really performed. So, here there is a habit of matching a festival with a *tourada*: Holy Ghost? *Tourada*. Holy Trinity? *Tourada*. But a bullfight is not something you do for God. It is just something you do for leisure. Also, each *freguesia* celebrates its patron Saint with a *tourada* or a banquet.”

A: “It is like a game?”

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<sup>15</sup> There is an overlapping of terms: ‘*voto*’ stands for ‘vow, promise,’ while ‘*bodo*’ stands for ‘donation.’ As one vows, one donates something; that is, not vowing *to* donate but vowing achieved *through* a donation. The donation seals the vow. More generally, ‘*bodas*’ are banquets and feasts organized by a patron, which is a typical case of *bodo*.

H: “More of a tradition. But this should be clear: it is not an immolation. It is not a sacrifice. There is no religious relevance [in the act of slaughtering].”

A: “In the sense of a lack of continuity?”

H: “No. What I mean is that cows and bulls... they are part of a vow. However, it is not a sacrifice of a living being. The cow is killed to feed people, not to please a divinity.”

A: “Has there been an age in which the Church would doubt the doctrinal value of the Holy Ghost...?”

H: “Well, the Holy Ghost is part of the dogma...”

A: “I meant doubts concerning the way the Holy Ghost was celebrated *in Terceira*.”

H: “Well, it was natural to suspect of changes in form. But this is just a form. But form is not substance. They could still say: we are Catholics. There was never an intention to separate from the Church. Therefore, there was no chief motivation to fight a form of devotion. These people identified with the [Catholic] Church. The clergy has always ruled the interpretation of the phenomenon. And priests are the priests of given communities. Differences might be a source of comparison and encounter. Well, there is a hierarchic leadership in the community, and in the Church.”

## A.6. João Avelar (1958–)<sup>16</sup>

### A.6.1. Conversation

A: “What is your role at school?”

JA: “I am João Avelar. I have been teaching Portuguese language and French language for about 43 years.”

A: “Congratulations.”

JA [laughs]: “Fundamentally, I have always been teaching at this school: Portuguese and French. I have been involved in various projects: at the school level, at the level of the Regional Department of Education... My great goal is that school entertain a dialogue with society.”

A: “A communication?”

JA: “There should be a relationship between what we learn at school and what we do in life.”

A: “Have you worked only in Terceira? Or maybe other islands as well?”

JA: “I began in Santa Cruz das Flores [Flores Island]. That is where I began. I gave classes in two schools in São Miguel. And here you go: now I am here.”

A: “So, you are originally from Flores?”

JA: “I am from Flores, yes. Born and raised.”

A: “I have a couple of questions, here. Are there things you *do not* have to teach students, here? They know that already.”

JA: “I believe the great need... Well, in some regions—such as this one, which is an insular region—whose history is great but whose people’s Autonomy is short.”

A: “Autonomy?”

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<sup>16</sup> Avelar and Marcelli, *Entrevista com João Avelar*.

JA: “Yes, I am talking of autonomy.”

A: “As in the 1974 Revolution?”

JA: “It happened a bit later: Regional Autonomy. Well, in such context, I believe we need to have a ‘mechanism of identity.’ Something that values what is Regional—yet without exaggerating. Valuing, yes, but valuing what matters. This is what we miss at the regional level. There are some attempts, of course. There is an attempt to integrate at school a subject, which is called ‘History, Geography, and Azorean Literature.’”

A: “Is it a subject or a subject ‘area’?”

JA: “It is a subject area, which tells you what to teach. However, political power is not convinced of the relevance of such subject.”

A: “Local politicians?”

JA: “Local leadership. It is sufficient to watch politicians. Most of them do not believe that the Regional component plays a role in universal education. [*inaudible*].”

A: “But is there a divide between teachers, as well?”

JA: “No. I do not believe there is a divide. Part of the people, here, hold a different conception of what the regional component should be. They believe, for example, that students will learn this component by themselves—outside of the school. That is, empirically.”

A: “Empirically?”

JA: “But that is false. That is not true. For me, this theory is just false.”

A: “Do you have examples of that among the youth?”

JA: “Should I make an example? Well, this year it is the Centenary of the birth of Pedro da Silveira.<sup>17</sup> Pedro da Silveira is a Florentine poet, born in my land, who had a specific role in his generation. His literary work is important to get to know Azores. If you ask questions around about Pedro da Silveira, most young Azoreans will have no idea of whom he was.”

A: “They do not know...”

JA: “They do not know! Educational activities should always be mindful. Therefore, my theory is confirmed. Of course, this is my conception of how things go.”

A: “Talking of more technical things... What role or position could Azorean literary (or musical) authors in the standard curriculum?”

JA: “I will say a thing. There are some Azorean writers—let us talk literature—who are taught in the standard curriculum. For example, Antero de Quental.<sup>18</sup> Antero de Quental is a Micaelense writer, and he is featured in the national curriculum.”

A: “All the country?”

JA: “Yes. He is transversal: Autonomous Region, and the Mainland escape. He could be challenging to deal with because of his philosophical side. This does not prevent him from being taught at school, but it could be difficult. Students who work on that might not like philosophy. But this is not the issue. This is not the issue. When we talk philosophy that is conveyed through poems, things get difficult. His dialectic was poetry. We cannot say that, when students are sixteen years old, they are universally able to tackle this topic; it is already

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<sup>17</sup> “Pedro da Silveira, Azorean born in Flores, settled in Lisbon in the middle of the Revolutionary decade of 1970s; he worked as journalist, literary critique, researcher, ethnographer, translator, writer, and distinguished poet.” Cfr. Anonymous, ‘Sessão Comemorativa Centenário do nascimento de Pedro da Silveira’, Public service website, *Agenda Açores* (blog), 12 September 2022, <https://agendacores.pt/event/sessao-comemorativa-centenario-do-nascimento-de-pedro-da-silveira/>.

<sup>18</sup> Portuguese poet and philosopher, key figure of the Nineteenth Century. Cfr. Antero Tarquínio de Quental, *Os Sonetos Completos de Anthero de Quental*, ed. Joaquim Pedro Oliveira Martins, 2nd ed. (Porto: Lopes & Co., 1890).



difficult for them to have a picture of what idealism was. Now, think of an *application* of idealism to literature... This is a joke. The case of Antero de Quintal and students: he is regarded as a canon author. The role of school—we were talking about that—the role of the school should be that of gathering, of preventing... So that, when someone addresses Azoreans, they can relate to something else. This is a matter of curricular decision. There are some who are at a different level than others.”

A: “And who should make such decision?”

JA: “In this existing subject... ‘Azorean history, geography, and literature.’ Grades 7, 8, and 9. After that, there is little regional component. After that, the regional component disappears. So, it is difficult to call it ‘integrated.’”

A: “And you... which opportunities do you think young people have outside of the school?”

JA: “I am a pessimist, here. Outside of the school there are not many opportunities. In Terceira Island there are two Institutions that concerns themselves a lot about Azorean Culture: a Casa do IAC (Instituto Açoriano de Cultura) and another institution, which is the Instituto Histórico da Ilha Terceira. These are two institutions that concern themselves with such issue. However, what is certain is that the knowledge promoted by those institutions does not attract youths right away. They attract people that have already travelled [at the intellectual level]. So, we really miss an institution for the youths.”

A: “You know, when I spoke with the elders (e.g., of the *freguesia*), they told me that there are always a lot of youths involved in local activities. And they are pleased by youth participation. And this surprised me.”

JA: “I agree. This perspective is fully legitimate. We [in the Island] perform above national level. For example, Philharmonic Societies are full of young people. We have music schools. They are so many, here. Some *freguesias* have more than one. Maybe, in the biggest islands, it is sometimes difficult to convince the youth to participate. But in the smaller islands? It is

all young people. That is, people who already know how to play... and they play well! Or they act, they do theatre... Hence, in such small settings, the situation is a bit different. Literature and music, here, is popular literature and popular music. In the island, the participation of young people is widespread.”

A: “And what do *you* think of the classification of Carnival: is it theatre? Is it poetry? Is it dance? What is its place?”

JA: “What is its place? Where do I place it?”

A: “Well, I am aware this is a very general question...”

JA: “I believe that it is fundamentally a theatrical activity. Music is instrumental to the drama that is put on stage by a *bailinho*. The *bailinho* lives through both what is said [words] and what is listened to [music]. These two dimensions come together, and it is an extraordinary thing. Writers put the same effort you would put in lyrical poems. These are true lyrical poems. But, when it comes to theatre, there are many people that think it has some roots in Gil Vicente.<sup>19</sup> Gil Vicente was a great playwright of the Sixteenth Century.”

A: “But is there continuity?”

JA: “There are a lot of features of the theatre of Gil Vicente that have been transposed here.”

A: “Is this what you think?”

JA: “No, no. There is a list. I mean, a scholar—Noronha—has studied the phenomenon. Five centuries later, he is convinced that Terceira’s theatre is a continuation...”

A: “I was asking that because I read books in which historians think there is continuity and other books in which historians do not believe there is continuity.”

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<sup>19</sup> Gil Vicente was the greatest Portuguese playwright of the Sixteenth Century. Cfr. José Camões, ‘Gil Vicente e o teatro português de Quinhentos’, in *Gil Vicente: Compêndio*, ed. José Augusto Cardoso Bernardes and José Camões, Coimbra Companions (Coimbra, Portugal: Imprensa da Universidade de Coimbra, 2018), 49–66.

JA: “Well, the *bailinho* is the closest thing you get to Vicente’s theatre.”

A: “Interesting. Another curiosity: are there things that could be learnt *during* the Carnival or when undertaking Carnival preparation?”

JA: “Overall, there are many people that the more they participate to *bailinho*... well, to prepare all that, people need to learn many things: to play an instrument, to speak in public, write poetry. Carnival is a free form to convey all that in a material sense.”

A: “Management?”

JA: “There are people with such role. They are natural leaders. They can stay there, put several characters in a show... that is what they do. It is a living theatre.”

A: “Is there a relation with the development of *freguesia*’s politics? For example: the leaders of the shows become political leaders?”

JA: “I have no idea. In some *freguesias* there are people who already have an official role—not necessarily institutional—and basically, they keep covering that role during the preparation of Carnival. There could be, of course, a double-entendre between politics and culture, but I cannot see it.”

A: “So, should I write there is none?”

JA: “No—look, Andrea—it could be totally possible. It is just I have no evidence to substantiate this assertion.”

A: “We will leave it as a hypothesis. Another question: do you have any memory of Carnival you would like to share?”

JA: “In Flores, Carnival is very different from Terceira. My earliest memory of Carnival is, of course, from Flores. There are some aspects in common, but it is very different.”

A: “Could you make a comparison for me?”

JA: “Yes, of course. At the beginning, I did not like Carnival. I will relate to you my personal experience. Eventually, I married a Terceiran woman. My wife is from Terceira. She adores Carnival...”

A: “Adores?”

JA: “She adores it! Moreover, my father, who is from Flores, went to Terceira for his military service during the Second World War. It was 1939–1945. He had opportunities to attend Carnival and loved it. Therefore, my father and my wife have always liked Carnival. But let us go back in time. In Flores there is a Carnival... and my earliest memory is that there are people—only men, actually—that would perform a specific dance... and such dance had a specific, dramatic character. When I was very young, a child, I remember there was this man that could play the role of a woman. That is what I became aware of. I became aware of the fact women could be played by men. One thing is life, another thing is representation. It felt completely natural to me. So, I asked my mother, who was also my teacher... you know, there were not many teachers there. I asked my mother to explain that to me. At the time, Carnival was a dance that would unfold under an archway...”

A: “An archway?”

JA: “Yes. People would stand by the opposite sides of the road and would hold the ends of an arch, which is a bent stick covered with flowers. I do not know if they still do that in Flores.”

A: “May I ask how the arch was made?”

JA: “It was like a cardboard stick that people would hold, to create an arch under which dancers would pass. And there were flowers stuck to it. And those who passed under the arch would sing and dance. It was very different [from Terceira]: *danças de Entrudo*. Here, in Terceira, *danças de espada* are done in a similar way. But there are also dances with comedic topic. *Dança de espada* is always tragic.”

A: “And in Flores?”

JA: “There was some drama, but always light-hearted.”

A: “I got confused because drama and tragedy sound very similar in Italian.”

JA: “I will explain. In Portuguese, drama is a general word. It includes tragedy and comedy. *Dança de espada* has a tragic topic. But in Flores we had *danças de Entrudo*. Men would dress like women and sing and dance as they passed under the arch. They would sing and dance a subject that does not have as many tragic elements as *dança e espada*.”

A: “Was it in the 1950s?”

JA: “1960s. I was born in 1958. I do not remember things of when I was two years old.”

A: “Naturally.”

JA: “These things had disappeared, but now they have been revived. They have been rehabilitated.”

A: “And was there a shock when you got married? When did you begin attending Carnival in Terceira?”

JA: “Pay attention. My wife had joined me in Flores. But we went back to Terceira in 1984.”

A: “And when you got here?”

JA: “At first, I did not like Carnival. I thought it was ridiculous. It is an acquired taste. But, at first, I was *forced* to go.”

A: “Forced?”

JA: “Yes. Because my wife did not drive. Therefore, to visit all *freguesias*, I had to drive. I drove both my wife and my father around. I would drive them to a *Casa do Povo* and wait for them—five or six hours—as they watched the dances.”

A: “So, you were like a taxi driver.”

JA: “And that is when I began to pick a liking to it.”

A: “And your ideas on island traditions... are they recent or late developments?”

JA: “They are recent. It is important to know to value. We cannot value without knowing.

Two things, two activities, two traditions of which I spoke about: it is all folklore.”

A: “One last thing. How many hours are dedicated to Azorean culture, at school?

JA: “I will let you have a look at our planning.”

[He shows me the paper]

A: “It was more of a structural inquiry.”

JA: “I do not know the exact number of hours because I do not teach it. But I believe it must have its own weight. Is there anything else you need?”

A: “I might contact you later for a revision... you know... all my investigation is in English.”

### A.7. José Olívio Mendes da Rocha (1949–)<sup>20</sup>

I was introduced to Rocha thanks to the brokerage of the Director of the Museum of Angra do Heroísmo. Rocha is the one of the former Directors of the Museum (1989–2001) and has a background as a lecturer at the University of Azores and was one of the organizers behind the creation of the Museum of Carnival ‘Hélio Costa,’ in Lajes. As of 2022, he is the President of the Instituto Histórico da Ilha Terceira, is involved in the requalification of local heritage museums [*Casas Etnográficas*].<sup>21</sup>

#### A.7.1. Interview

A: “What is your profession, generally speaking?”

J: “I was born in Terceira Island, *freguesia* of Santa Bárbara, in 1949. Nowadays I am the President of the Instituto Histórico da Ilha Terceira.”

A: “What is the difference between the Instituto and the University?”

J: “This institution was created in 1942 and, within the context of Angra do Heroísmo—well, to say it better, of the ancient district of Angra, which encompassed Terceira Island, São Jorge, and Graciosa—it had the goal to deal with all things related to culture, cultural relations. It places itself within the politics of Estado Novo, which established the—so to speak—autonomous statute of the time... it was 1931 and mandated the creation of a department for activities with a cultural character. Therefore, it was intentional—as I told you before, there are different interpretations of this. The local elite, which unfolded also through the names that used to have connections at the times of Estado Novo, were summoned...”

A: “Do you mean politicians, doctors...?”

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<sup>20</sup> Rocha and Marcelli, *Entrevista com José Olívio Mendes da Rocha*.

<sup>21</sup> Instituto Histórico da Ilha Terceira, ‘Galeria de Presidentes’.

J: “Yes, yes. They created the Instituto Histórico. Therefore, at its outset, it had the goal of answering the cultural needs by forming a... I do not know how to put it... a small academy. Concerning the statute, [it was meant to bear] the same image and likeness of the Portuguese Academy of History. The point of reference, at the time, was the Portuguese Academy of History. So, the statute reflected such trend.

Ever since the beginning, the greatest concern was, on the one hand, to publish historical sources. The goals were history and ethnography, let us say so: the main ones in terms of culture—to prioritize the study of history, of folklore, and material culture. The supplementary goal was the dissemination of these works: the dissemination and creation of the conditions for their publication. In such context, since its first year of activity, a gazette [*boletim*] was published. The *Boletim do Instituto Histórico* had the goal to publish important documents—that are regarded as important for the history of the Azores—and, a well, reflect on their history and relevance.”

A: “Is this also an educational institution, you think? Because I saw you have meetings, classes. Is this an adult education institution?”

J: “No. Not specifically. Just ‘education’ in general terms. Let us say that after April 25 [1974], which is a milestone date that entailed the change of the characteristics of this institution, it became more engaged in adult and youth education and raising awareness about the importance of culture and its diversity. It did this even before, but not with such intensity, because it was not regarded as a priority. Thanks to April 25, it became much more relevant in those years. It is not that there was no connection with that [education], but at its outset it was not much of a concern. Here it was created the administrative office of education, which was way more tied with an institution which, back in the days, was called ‘Juntas R.A.O.’ [*inaudible*], which is now Direção Regional da Educação. That is, in the old days there was



nothing much to share with education, in administrative terms. Of course, this did not prevent a connection with education, broadly speaking.

Well, after April 25... The Institute has a UNESCO Club [*Centro UNESCO*], which has mostly the goal of gathering new people for the dissemination and learning... and let us say, in connection with UNESCO, although not exclusively.”

A: “Did it happen as a consequence of April 25?”

J: “It all began about year 1978. That is the beginning of the creation of the UNESCO Club in Angra. That is the date, more or less.”

A: “Is there a connection between the creation of the UNESCO Club and the accreditation of the city centre of Angra as a UNESCO heritage site?”

J: “Well, there is an agreement with the local administration. But being a UNESCO Club has more to do with the function of dissemination and work with people connected with culture and heritage. Of course, Angra stands as an example of this because of the relevance of its heritage, which has to be disseminated and ‘translated’ for younger people.”

A: “The acknowledgment of the architectural features of the town as UNESCO heritage is subsequent to this?”

J: “Well, in practical terms, they go hand in hand. Why? Because the initiative was by the then-President of the Instituto Histórico, Dr. Álvaro Monjardino: the accreditation of the historical centre of the town. But the creation of the Club comes after this, that is, after 1983. Since that is the year in which Angra was classified as world heritage site.”

A: “So it was *after* the earthquake.”

J: “Yes. The earthquake was in 1980. The accreditation of Angra is in 1983. After that, the UNESCO Club was created. The accreditation is due, for the most part, to the action of the Instituto Histórico, which, on the one hand, collected [information on] the historical foundation. And Dr. Monjardino was the promoter of a ‘juridical’ perspective [on culture], to

the point he arranged the legal process to justify the inclusion [of Angra in the world heritage list]. [inaudible] plan to be in the world heritage list, it is necessary to have the history, and the accreditation has a series of requirements that justify being classified as world heritage. Let us say that the main reason has to do with history. It is not much about the quality of the buildings—of the Cathedral, etc.—but because it is an urban area that tells a story. The urban site was founded in the Sixteenth Century, and, in general terms, it preserves its structure: the same structure you see in the map there [points at an ancient map hanging from the wall]. Hence, Angra...”

A: “Did the accreditation stop the construction industry in some way?”

J: “It is a challenge. Not just since 1983, but since the quake of January 1, 1980. Let’s say... Angra stayed... It reminds me of the fact [inaudible] but the University you have seen [still stood]. But Angra looked like a bombarded city, to the point that [inaudible]. And the process... the people had some awareness concerning the solution of such problems. Very quickly, I tell you, very quickly people began rebuilding their houses. That is, what is the problem there? Well, in the broader world, as well as in the *freguesias*, it is given for granted that they would rebuild, so that in a month or two they would already sleep in the house that was formerly collapsed. So, it was not much of a problem. But in Angra, the issue was much more complicated. Meanwhile, amid such contingency, the Committee for the Heritage Site was created. At the time, it was coordinated by Dr. Maduro-Dias.”

A: “I had a casual encounter with him.”

J: “He served two terms as a Board member for that Committee. It was an intermediary institution that would liaise with the City Council and the Secretaria Geral da Educação. So, some work that had to be done, worked well. But to make it work it was necessary to first obtain the approval of the Committee. The Committee gathered a representative of the City Council, a representative of the [Regional] Government... Formally, you had to abide by the

criteria to rebuild. For example, if you had a house without garden... For me, this is interesting, because that is one of the reasons behind Angra's accreditation: it is an urban complex [*conjunto urbano*]. There is the history of the urban centre, in the Sixteenth Century, which preserved to a great extent its original structure and the urban complex."

A: "So was it just history, or also the lifestyle...? The streets?"

J: "Yes, yes. As usual—and I believe it is normal—people sometimes have the idea of being limited in the construction. The building cannot exceed a certain height or have things that do not harmonize well with the urban complex. Hence, you have several conflicts, many misunderstandings, breaches as well. [*inaudible*] The director of the Committee... well, it is also an entity made of other people. You have the director, such as Maduro-Dias at the time, but there is also a team of engineers, architects, planners, which endeavoured to answer to people... to answer to their enquiries. How? By suggesting solutions that complied with the [urban] complex. But it all unfolded very peacefully. Somebody believed it was bad, but in earnest it was all very rational. In Angra, the buildings are, at best, ground floor and first floor. In the case of the area along Rua Direita<sup>22</sup> or Rua de São Joao,<sup>23</sup> buildings can have up to three floors. No more."

A: "Three on top of the ground floor?"

J: "Three *including* the ground floor. That is, because *before* the quake, there were many houses that had two levels, or three, and a ground floor—that is, the lower floor. And it was necessary to comply with the requirements to have such type of housing. And here is what owners thought: 'Put one more fireplace... or place another floor...' [*inaudible, laughs*]... Between the *Câmara* [city council], which was managed by a political party [that would have

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<sup>22</sup> N 38° 39' 18.2520", W 27° 13' 7.6296".

<sup>23</sup> N 38° 39' 18.6552", W 27° 13' 9.7746".

loved to please them]. Hence, there was always a great debate between accepting that houses grew in height [and respecting the original layout]. There has always been due dialogue, but with some challenges.”

A: “And is there an institution similar to this Board for the intangible heritage?”

J: “It exists at some level of the Direção Regional de Cultura. Technically, its name is Direção Regional dos Assuntos Culturais. The name should be stressed because of its... philosophical value. The function is the same, though: an administrative one.”

A: “What are the challenges of being an autonomous institution, here?”

J: “Well, we do not have the patronage of the Department, or the Câmara, such organizations... Let us say this is a great advantage. Not to have to follow to this or that executive decision on behalf of the government. But clearly there is one aspect that is not positive, which forces us to work in a different way. Since we do not have support of the Department or the Câmara, we have to fund ourselves. Therefore, we work on projects. Formerly there would be funding just for the sake of supporting; but now, funds are issued only within the framework of a project.”

A: “So... A project with data? Outcomes?”

J: “It is necessary to spell out where funds are spent, which applications are being made, etc. I think that such perspective is way more correct. Because there is a form of supervision, which is a positive thing, because there must be a benefit [in what we do]. The Câmara has a critical attitude towards whatever is being done and *how* it is being done. Therefore, I believe it is a positive and important fact.”

A: “I would like to know more about the relation between an Institution such as the Instituto Histórico and events...”

J: “Such as?”

A: “Festivals, celebrations, Carnival... And what is your place in the organization thereof... liaising with *freguesias*, etc.”

J: “Of course, of course. But let me start from the beginning. At the outset of the foundation of the Instituto Histórico, in the 1940s... well, it was founded in 1942 so let us say between 1943 and 1950... and even in the early 1960s, the Instituto had strong ties with power. It was an autonomous organization, but it could count on the support of the Junta R.A.O. [*inaudible*] or of the City Council. Let us say that such relationship would not foster the critical attitude of participating individuals and contrarian initiatives. These initiatives, in the 1940s, 1950s, and 1960s, were fully integrated in the politics of the *Estado Novo*. They concerned the area of ethnography. Most founders of the Instituto Histórico were ethnographers. The first President, for example,<sup>24</sup> or the parish priest of Altares,<sup>25</sup> and many other ones... they concerned themselves mostly with ethnography. That is, folklore. And they published a lot: about Carnival, about the [celebration] Holy Ghost. I am not saying it was ill-done, but it was markedly in line with the ideology of the *Estado Novo*.”

A: “That is, Portuguese-centric...?”

J: “A nationalist, perchance regionalist, State.”

A: “This had surprised me, because I saw there was an ethnographic interest concerning the specific differences of Azoreans, or maybe even Terceiran people... Because, you know, in my work you usually see dictatorial countries that suppress regional values. But in your case, there is always care for local folklore.”

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<sup>24</sup> Luís da Silva Ribeiro (1882–1955).

<sup>25</sup> Inocêncio Romeiro Enes (1892–1982).

J: “Well put. You raise a compelling point. For example, Frederico Lopes<sup>26</sup> was an ethnographer that collected many facts concerning Terceira Island, as well as São Jorge, Graciosa, and all the islands of the old administrative districts. The collected ideas, the ones he reported, were about the way of celebrating Carnival, or the way other rituals were carried out. But his writing reflected the ideology of [*inaudible*], of the People... of a People to whom he did not belong. I am not sure if you understand this point.”

A: “There is the idea of a People...”

J: “The idea is that there is a ‘Rural People,’ and then there are the Urbanites.”

A: “It is a point of view...”

J: “Well, it is the perspective *about* rural dwellers *by* urban dwellers. There in his books it is called ‘the common people [*a gente do povo*]’. Hence, he does not identify just with a scholar, but with someone who is on top of things.”

A: “I have what might sound like a very technical question. Is this the consequence of the ties with *Estado Novo* or of a more widespread bourgeois attitude?”

J: “Let me see. Well... It has to do with national-syndicalism [*corporatism?*], well... there is some sort of ‘regionalist nationalism,’ if I can put it this way. It is a very interesting aspect. The role of these [rural] people, seen by the city people, was to entertain others. These [rural people] were invited over to dance, to celebrate... but without an appropriate acknowledgment of their own identity, which was dynamic. How could I put it?”

A: “So they were like: ‘These are just shenanigans; these are just jokes...’. Right?”

J: “[The urban people] would not acknowledge [the rural people] had their own autonomous personality.”

A: “They had no awareness of that. Of the ritual value of celebrations...”

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<sup>26</sup> Frederico Augusto Lopes da Silva Júnior, namesake ‘João Ilheu’ (1896–1979).

J: “Correct.”

A: “You know, you are the second or maybe third person who talks to me about the ‘urban’ view of the ‘countryside,’ and of a misunderstanding of [cultural] categories.”

J: “Yes, yes. These are ideologies. Take Luís Ribeiro, who is regarded as the founder of [the Instituto Histórico]. He had his own ideas. But his perspective mostly concerned the repurposing of things. For example, he paid a lot of attention to traditional trades. The main argument of one of his writings I read was, let us say, the possibility to *return* to old techniques at work. Old jobs were regarded as a source of inspiration to dynamize [contemporary jobs]. For instance, the carpenter, the blacksmith, and people from various trades used to employ traditional techniques. For him, it was very important to know how they worked. But he did not believe we should work *solely* that way. It was taken as a principle of transformation and actualization.”

A: “So his goal was to change the *povo*.”

J: “Exactly. This perspective is different from that of Frederico Lopes. Frederico Lopes wanted people to modernize. And he tried to infer fixed frames of reference.”

A: “We study... to change?”

J: “Well, we study... to preserve. Not just that, of course. But there was a certain fear people would not learn and develop. His idea was that people should think by themselves and use their brains. He regarded it worse to never move on. So he had such vision... but he was not fully aware of that. Frederico Lopes had his own a worldview. It does not contradict that of Luís Ribeiro, but [Ribeira’s] is different. His vision is mostly concerned on modernization and development.”

A: “Lopes...”

J: “Frederico Lopes.”

A: “Lopes is about preservation? And Ribeiro...”

J: “Ribeira was more about transformation.<sup>27</sup> It is very important to recall his tenet: ‘we study the customs of people, we want to know how things are done.’”

A: “Are there examples of change that was brought about [by Ribeira]?”

J: “Yes, yes. How would people transform?”

A: “But was transformation just his hope, or did he take actions himself?”

J: “No, he did not [act]. These people were intellectuals and let us say that they would have some local involvement, but...”

A: “But did he talk to workers to instruct them on new ways of working?”

J: “Nope. Absolutely not. He had goals. But he wanted above all let people know about that. He wanted to provide the grounds for change. But he was not an action man. He just wrote.”

A: “So he just wrote and waited for others, such as the City Council, to take inspiration from that.”

J: “Yes, yes. Exactly.”

A: “That is way too intellectual.”

J: “Exactly. He was a Conservative Republican.”

A: “A Conservative?”

J: “He was not a Reactionary. He was just a Conservative. On the contrary, Mr Frederico Lopes was—to say it in lay terms—a Reactionary. Let us say he was a Fascist. He would cultivate the ideas of the old island, whereas Luís Ribeira, though Conservative, was also a Republican. So he was very critical of the *Estado Novo*.”

A: “In his own way...”

J: “Exactly.”

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<sup>27</sup> This statement should clarify to whom the previous statements should be attributed.



A: “I would like to ask you about your memories. But before that, could please explain to me the relations between different scholars. I read the books of Bretão<sup>28</sup> and Enes.<sup>29</sup> And the latter has a vision that, for me, is very Socialist. Especially when he talks of the development of Carnival.”

J: “Yes.”

A: “He talks of a political Carnival. A Carnival that raises its voice against authority. A Carnival that is not connected to *Justiça da Noite*, but, being rural, it is independent. There is a Carnival that is not that of Angra. And there is all a historiography of a ‘people,’ a *povo* that is apart [from that of Angra]. But is this true or is this an interpretive construct?”

J: “...”

A: “I would like your interpretation of this, because I am looking for very specific perspectives.”

J: “Sure. He is doing it intentionally. I can imagine... there are all these characters who wrote on the topic. Carlos Enes is markedly ideological: he used to locate himself within a scope that we could call Marxist or Leninist. More Socialist than Communist. And this is the core of his sociological background [*inaudible*]. In those times...”

A: “1980s?”

J: “No. I am speaking of the time in which such figure developed.”

A: “Now I see. Because he worked both *before* and *after* April 25 [1974].”

J: “Yes. He was an Antifascist Militant. He used to organize things. I am slightly older than him, but I knew him. He was a Militant of the Juventude Católica Portuguesa, of the JEC [Juventude Escolar Católica]. But when things changed and after the opening... Well, you

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<sup>28</sup> José Orlando de Noronha da Silveira Bretão (1939–1998).

<sup>29</sup> Carlos Manuel Pimentel Enes (1951–).

should know that there are other people who supported the [antifascist] movement but less openly. For example, I worked with Bretão for some years in the trade unions' movement. Well, Bretão was not, properly speaking, an anarchist, but he had a very liberal—perchance libertarian—view of traditional political parties. His great fighting goal was to identify with the worker, in order to support the justice movement...in more or less ten years. He was a lawyer and he would support the trade union with his knowledge of the Law. But his way of working was with people [*inaudible*]. For example, when [workers] had conversations with the employers or with the employers' associations, he would work all night to draft a contract proposal. Or, for example, when there were personal conflicts that would result in a strike. The perspective he adopted was to keep ties with the trade unions' representatives and illustrate what they should do. He would prepare people to drive their own struggle.”

A: “And isn't that the Marxist project?”

J: “Well, it was similar. But he was very critical of political parties.”

A: “So it was the project to create an ideal man.”

J: “His conceptualization was closer to that of Paulo Freire.”

A: “Paulo Freire?”

J: “He was truly and admire of Paulo Freire.”

A: “It is the second time I hear of him this week.”

J: “It is because of the way he conceived of the individual.”

A: “There is the direct object of my research. And then there is a side object, which results from the usage of traditions on behalf of intellectuals. I do not have specific biographical information because it was not my main target, but maybe I should give it more room. It is important for me to understand the relationship between individuals and Carnival... That is, an interpretation which is not that of a foreigner, like me. I would not speak of manipulation of the Carnival, but there is a way of representing and using the Carnival.”

J: “Well, let us clarify the role of Bretão on trade unions. Have you read Bretão’s book on Carnival?”

A: “Yes, I have a copy, back in Italy.”

J: “This aspect, for him, was very close with his general perspective on things. For him, it was important to have a theatre. He created his own acting company in Angra. I do not recall the name, but it was hosted by the Workers’ Band [*Fanfarra Operária*].<sup>30</sup> It was cultural associationism through theatre. It was mostly concerned with the works of Brecht. It dealt with class consciousness and their existential dimension. He would not mix the two things—trade unionism and theatre. However, he founded the acting company as he was working for the trade union. But it is the way he would relate to trade unions’ representatives and with workers: it was always driven by his understanding of theatre because he believed we all play roles.”

A: “Well, that is a very strong stance.”

J: “Well, this attitude belonged to some people who were members of the bourgeoisie. His father was himself a lawyer, he was involved with the City Council.”

A: “So did Bretão work with the *Estado Novo*?”

J: “His *father*. He was a man of the *Estado Novo*. He used to publish articles on local newspapers defending the *Estado Novo*. He was close to Lopes and was a hardliner as him. José Bretão had a brother, Luís, who is another interesting character. He used to be a sportsman, but did not accomplish much because of a health issue. He animated university life, in Coimbra. He was director of a trade union movement. [*inaudible*] He was then drafted for the Overseas Territories [*Ultramar*].”

A: “In Angola?”

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<sup>30</sup> Círculo de Iniciação Teatral da Fanfarra Operária.

J: “In Angola. Exactly.”

A: “And you?”

J: “I was not drafted because by the time I finished my studies, the revolution had occurred.”

A: “It was just a curiosity.”

J: “In Coimbra, he learned a lot and made his ideas clearer. He construed his ideological position.”

A: “But Brecht is not the *Entrudo*...”

J: “Well, hear me on this. Together with Brecht, Bretão believed life is theatre. He believed all issues of life could be seen this way. So if people would commit this way... for example when preparing a strike or an interview with their employers, he would instruct them about their role, how to act...”

A: “The acting role!”

J: “Exactly. Back in the days, the employer would propose a lawyer chosen by him. But workers instructed by Bretão would deny this opportunity and say: ‘We have already prepared ourselves to defend our own rights.’ When they had doubts, they could ask Bretão. This way, he was trying to make them autonomous. This is very interesting.

Of course, this does not have a direct relationship with the issue of Carnival. However, he would maintain that the Carnival was an opportunity to express his critiques. To criticize the situation. For example, there is a work by Carlos Enes on the Carnival... Do you know that one?”

A: “I have read it, yes.”

J: “One of the main points, there, is that Carnival offer opportunities to criticize the current situation.”

A: “And does this critique-function still exist nowadays? Or has it disappeared?”

J: “Nowadays... this issue is very important. Currently... Do you know how it works?”

A: “Well, I attended Terceira’s Carnival in 2020 and then my inquiry was interrupted by Covid.”

J: “Those who participate the Carnival are common people. From Agualva, from Vila Nova, from Lajes... There is a person from Santa Bárbara... Antonio Mendes. He is very inspired. He lives an apparent contradiction: he is, at the same time, religious... but he has also a very critical view of things.”

A: “Is he the author of the *Bailinho dos Turistas*? I do not know if it is the official name, but basically there is this story about tourists coming to Terceira...”

J: “Yes, that is him. I think so.<sup>31</sup> He is a person that, in his plays, in his *danças*, in his *bailinhos*, cultivate a serious attitude—for example, with the *danças de espada*, and with topics concerning the history of Terceira—for example, they set up a *dança* about Paulo da Gama<sup>32</sup> setting foot in Terceira Island.<sup>33</sup> Another historical topic is the story of [Curtilage?]: it is a local family. And it was very interesting because it told the story of people that were important in the discovery of Terceira Island, with their boat and all the rest.

#### **A.8. João de Brito do Carmo Meneses (1945–)**

Father João de Brito do Carmo Meneses celebrated in 2019 his fiftieth anniversary of priesthood. Born in Santa Bárbara, he moved first to São Miguel and then back to Terceira to study at the local Seminaries.<sup>34</sup> He then got appointed parish priest of different urban parishes

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<sup>31</sup> It was not António Mendes but João Mendonça.

<sup>32</sup> Paulo da Gama (1465–1499) was a Portuguese explorer and the older brother of Vasco da Gama. He fell sick on the way back from the Indies and was buried by his brother in Terceira Island.

<sup>33</sup> *Dança de Santa Bárbara 1990 ‘Vasco da Gama’*, 1990, <https://www.youtube.com/watch?v=WoLj2v8bADc>.

<sup>34</sup> José Armando Mendes, José Gabriel Oliveira, and José Olivio Rocha, ‘Padre João de Brito do Carmo Meneses: O Homem e a Obra’ (Conselho Económico da Paróquia de Santa Bárbara e Junta de Freguesia de Santa Bárbara, 2019), 1, Col. Andrea Mattia Marcelli.

and then went back to the West of the Island, where he came from, to serve in Santa Bárbara, Cinco Ribeiras, and Doze Ribeiras.<sup>35</sup> He is one of the founders of the Clube Desportivo das Doze Ribeiras, and of the Grupo Folclórico das Doze Ribeiras. He helped to develop local infrastructures, including the building of fountains, football fields, picnic areas, and seaside facilities.<sup>36</sup>

#### *A.8.1. Memoir*<sup>37</sup>

“I was born on April 3, 1945, in the *freguesia* of Doze Ribeiras, a rural hamlet in the West of Terceira Island, which is about 16 km from the centre of the city council of Angra do Heroísmo, declared world heritage by UNESCO, in 1982.

My father was illiterate; my mother had only completed the third grade of primary school. My father was a small farmer and herdsman, who used to possess only three cows and their respective calves, which provided milk for family consumption and ensured pulling power to operate the working instruments as part of an economy of subsistence: each family cultivated for itself what it needed, and the excess was sold in order to purchase with the income what was missing. Often, food was purchased (for instance, 20 horse mackerel [*chicharros*] from the peddlers for half a quarter of corn). In addition to cattle, my family had half a dozen sheep that produced the wool that was necessary to produce blankets and quilts for the beds and some items of clothing.

My mother took care of the domestic chores: tidying up the house, preparing food, the care and education of the children... and, in some periods of the year, she would help our father with the lightest type of farming chores, such as the corn harvest at the end of summer.

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<sup>35</sup> Mendes, Oliveira, and Rocha, 2–3.

<sup>36</sup> Mendes, Oliveira, and Rocha, 3.

<sup>37</sup> João de Brito do Carmo Meneses, ‘Naci a 3 de abril 1945...’ (Word document, Santa Bárbara, 12 May 2022), Col. Andrea Mattia Marcelli.

Furthermore, it was her who took care of about ten hens that would lay their eggs to feed the family, and [she] would produce the sweets—which she baked herself—for the celebration of annual festivities: *filozes*<sup>38</sup> for Carnival, *folares*<sup>39</sup> for Easter, *massa sovada* [sweet bread] and *pão de leite* [milk bread buns] for the Crownings of the Holy Ghost [*Espírito Santo*] that are celebrated all over the Azores during Easter time and in a more solemn way on Whitsunday and on Trinity Sunday. Moreover, every week—usually on Fridays—mother would bake a batch of *pão de milho* [cornbread] (more rarely, also wheat bread), which would ensure daily nutrition for the family; the first meal of the day (the *almoço*, how we used to call it then)<sup>40</sup> that, for almost all the families in this rural context, was made of a bowl of cornbread crumbs with milk; the same was served for *ceia* [dinner], the last meal of the day.

As children (I was the oldest of three), more or less at the age of four and five would begin to help our parents in the jobs that we could manage and that we would also learn to do. Family was our first school: there, we learnt to pray and to cultivate Christian values. Moreover, we would accompany our parents to the church for the Sunday eucharist and for the festivities and for other religious practice of our parish.

I began attending primary school at the *freguesia* in the academic year 1952–1953; since my parents could not help us with homework, I had to profit from classes. My teacher was very competent, hard worker, demanding and gifted by good human and Christian principles. In the academic year 1955–1956 I completed primary school and sat the Fourth Grade exam.

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<sup>38</sup> *Filhoses*. In Terceira’s fashion, they are baked as mid-size cupcakes with no garnish. See *Filhoses do Forno à moda da Terceira - Terceira Dimensao 112*, 2015, <https://www.youtube.com/watch?v=zenxde5vGkI>.

<sup>39</sup> *Folar* is a sweet bread baked with whole eggs in it (the shell of the egg is not removed, and it is baked as is). See Patricia Almeida, ‘Folar Açoriano’, *Food With A Meaning - Receitas com Significado* (blog), 4 April 2012, <https://foodwithameaning.com/2012/04/04/folar-acoriano/>.

<sup>40</sup> *Almoço* now means lunch, but it used to mean *breakfast*.

I had in mind to go and work the land with my father. In summer of the same year I was approached by my fellow disciple and friend, who told me: ‘I am going to the Seminary, would you like to come with me;’ my answer was: ‘I have never thought of that, but I would like to continue studying.’ I spoke with my parents about this idea, but my father told me that, in a short time, the first two years of the Seminary would be moved to the newly created Minor Seminary on the island of S. Miguel and that he had heard that the second year they would return to this island of Terceira, so that I could attend only the next year. I convinced my friend to let it be for the current year. In academic year 1957–1958 we enrolled in the Seminary of *Santo Cristo* in Ponta Delgada, island of São Miguel of this Archipelago of Azores.<sup>41</sup>

That school year, in that Seminary, there were 69 students (33 from the first year and 36 from the second year) and four teachers that ensured the teaching of the various school subjects we had to take; of these four teachers, which were priests, one was the rector, two were coordinators (one per teaching year) and another one acted spiritual director.

In the Seminary we lived a life of discipline, but with great friendship and camaraderie. We usually had five classes and four hours of study per day on weekdays. There were also times for leisure, sport, and communal strolls through the city. We would wake up early in the morning, about 6 am, and we had 30 minutes available for our personal hygiene. At 6:30 am we used to go to the Chapel for morning prayers, meditation, and the mass. At 7:45 am we had a first study slot: at 8:30 am we would have breakfast and, after a short break, we would begin classes until 1:00 pm, the time when we would have lunch; after that we would practice sport or would go out for a walk; at 3 pm we would have another class and, after a short

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<sup>41</sup> Apparently, the Seminary kept using the same structure in spite of the informant’s father forecast.



break, we would begin our hours of individual study, with a 10 minutes break at the end of each hour; at 7:00 pm it was time to dine, followed by 30 minutes of leisure time; at 8:00 pm there were about 50 minutes to study and then we would chill out for a while, until 9:00 pm. We had two weeks of holiday at Christmas and Easter, and three months in summer (end of June to the end of September).

In school year 1959–1960 I entered the Episcopal Seminary of Angra to continue my preparatory studies—philosophical and theological. I completed them in school year 1968–1969 and was ordained on May 25, 1969 (Whitsunday) at the Cathedral of Angra. The following year I attended Institute Pius XII (Post-Seminary institute) in the city of Angra, and delivered pastoral service at the parishes of Sé [Cathedral, town centre], Santa Luzia and Posto Santo.

In December 1970, I began my activity in the large parish of São José of Ponta Delgada, in São Miguel Island, as the stand-in vicary and was also tasked with the Chaplaincy of the town hospital. In February 1973, I went to Angra to work as the secretary of the bishop. In September 1979 I was appointed parish priest of São Pedro de Angra, a position I held until July 1990, when I became parish priest of Santa Bárbara, where I am currently serving, as well as parish priest of Doze Ribeiras, which I have been for 17 years. From 2008 to 2014 I have also been parish priest of Cinco Ribeiras, in addition to my charge in Santa Bárbara. Since school year 1979 until school year 2006–2007 I was also teacher of Moral Education and Catholic Religion at the Secondary School Jerónimo Emiliano de Andrade in Angra do Heroísmo.

During my philosophy courses at the Episcopal Seminary of Angra, circa 1962, I read an article in the journal of the Juventude Agrária Católica (JAC), which decried the fact the youths would leave the countryside to go study [elsewhere] and would not generally worry

about helping with the progress of their birthplace. That time, I promised myself: ‘I will help the progress of the people of my land.’

I wish also to relate about the fact that our child games were often based on adult activities. For example, we, the children, would imitate the jobs of our fathers: we used to make our own cows with the cobs of corn ear, and our own small pulling carts; and we would trade. In some periods of the year, we would play with the spinning top or with marbles. The girls, with the help of their mother or grandparents, would make their rag dolls and the dollhouses for them. During school leisure time, girls would do the cartwheel and sing traditional rhymes [*modas*] or would play other games according to their gender and age. The boys would generally pretend to do *touradas de corda* [rope bullfights], thus imitating a very typical custom of Terceira Island.

Often, during these shared games, we would exchange knowledge of what we had learnt at school or parish catechism classes, which contributed to their memorization.

During our study at the Seminary, we would help a lot, teaching the subjects we had understood to other colleagues who had not understood them well. At the Seminary of Angra, starting with the Fourth Year, we had a music professor that helped to bring out the best of us. Other than having great competence in his subject, he would also help us to grow our practice of it as well as other humane aspects. For example, the choir that existed in such teaching institution (which was the only higher education institution in Azores) gathered all students, which had grown to the number of a hundred and fifty, and not only the musically gifted ones. He would teach us that hearing could be educated and that the least gifted, when placed side by side with the most gifted, will become able to sing in tune. And it was true indeed: I know of several cases of students with few musical gifts that eventually turned out to be good musicians—and some became even music teachers.

Talking of the support to the *freguesia* in which I was born, mentioned above, I would like to report on some situations, which are evidence of the strength of volunteering.

1. Organization of a football team and construction of a small field to practice, in 1963. The youths and teenagers of that community had no place to practice sports. The creation of this football field, even though small (less than 2,000 square metres) gave them an opportunity to practice sport and was a notable opportunity for their education in different aspects.
2. Construction of a fountain and a drinking trough many years ago, as well as the improvement of the water supply for farming. The public water network reached the dwellings of this *freguesia* only in the 1990s. Until then, most houses used to have their own water tank: and those who did not have it would get their supply from the few public fountains, with small drinking trough for the cattle, which had been built in different places of the *freguesia*. The people of a given neighbourhood wanted to build a fountain-plus-trough close to their dwellings. To do so, it was necessary to channel the water for about 1,200 metres. One day, in summer 1970, a farmer I knew crossed my path in that neighbourhood and told me: 'It has now been many years since the construction of a fountain was planned, with its own trough, but nothing has been done. We could as well make it ourselves. On my behalf, I am available to freely contribute with my labour for two or three days, and I know other people think the same.' The following day I was in Angra, at the Public Water Systems Office, discussing the possibility of solving the issue that way. I was met with the goodwill of the public utility services and of the people of the *freguesia*, who were available to collaborate and work for free. In few days, the water would flow close to the houses in the area. That said, a very important movement was that which aimed to expand the troughs close to the already-existing fountains and for the building of other troughs that would collect the excess of the former. This initiative contributed a lot to educate the people on the value of volunteering and of mutual help to realize their wishes. And this is particularly seen in the following initiatives.
3. Expansion of the transit roads by the farming lands and opening of new roads. Here, those narrow roads are called *canadas* [trails]; until then, they were barely suitable for the transit of the traditional carts drafted by animals. At the beginning of the 1970s, the first tractors appeared in this place: it was necessary to improve those trails to allow those new modern agricultural machinery to transit through them. Here, once more, the people of this *freguesia* contributed a lot, either by freely donating the land lots needed to expand the *canadas* or providing days of labour. I heard that someone even gave 35 days of free labour.
4. Rebuilding of houses after the horrifying earthquake of January 1, 1980. This *freguesia* was one of the most hit and was almost completely destroyed. Once more, the solidarity, the goodwill, and the helpfulness of these people made itself clear in an extraordinary way: everyone would help each other in different ways. The terrible ordeal these people had gone through, because of such a wrecking quake, was nonetheless a good school of solidarity and volunteering.
5. The Folkloric group of Doze Ribeiras was the first cultural association of its *freguesia*. It was founded in April 1974 and was constituted mostly by teenagers and youths that would preserve dancing and singing, as well as some adults who were among the already-rare players of *viola regional*, which used to exist back in those days in Terceira Island. It provided to its members an important valorisation

concerning different cultural aspects, and contributed a lot to the promotion of the rich and typical popular culture of this town, both at a national and international level. In addition to the countless festivals in various islands of the Azores and Madeira, we participated to various festivals in Continental Portugal. Abroad, we participated to:

- a. France: Jeux Santons, Festival internacional de Saintes, Charente Maritime (1981 and 1984). Festival Mondial de Folklore, Gannat, Auvergne (1981 and 1991). Festival Internacional de Langon, Bordéus (1984). Festival Internacional de La Grande Motte, Montpellier (1984). As well as other shows in various cities and towns (1981, 1984, 1991, 2002).
- b. Swiss: Festival Internacional de Fribourg (2002).
- c. Italy: in 1984 we got invited at an international festival in Frosinone, but it was not possible to accept the invitation because we were already committed with the French. However, in July of the same year, after the Festival de La Grande Motte, we went through Rome and got a Wednesday audience with the Pope.
- d. United States of America: in 1985, we did a one-month tour around California, with 23 shows in various cities of that North-American State. In 1999 we went back to the USA, with shows in various cities of the States of Massachusetts, Rhode Island, and California. Those shows were mostly attended by Azorean expats.
- e. Brazil: in 1998 we did a tour of about one month with shows in Rio de Janeiro and in various cities of the States of Santa Catarina and Rio Grande do Sul. Once there, we helped to create and to carry out musical training for the inhabitants of Santa Catarina and Rio Grande do Sul, which are very proud of descending from Azoreans, which began populating those States in the Eighteenth Century.

When this folkloric group began its activity in 1974, the players of *viola regional* were already few in numbers. By taking advantage of the fact that some still existed in the *freguesia*, we started a school with two courses, in 1976 and 1977: one for teenagers and the youths, and another one for children. It was the first course of *viola regional* in the Island that specifically trained players for this typical musical instrument. This was replicated in other places and societies of the Island, and it contributed a lot to the cultural growth of our people, and it had also effects on the development of our Carnival.

Talking specifically of Carnival, I must say that it has changed a lot, especially in the past 30 years. When I was a kid and a youth, there were barely *danças de espada* [sword dances], which would stage the so-called ‘serious subjects’ based on topics that were historical, biblical, or contributed to the moral education of everyday life; and there were *danças de*

*pandeiro* [tambourine dances], whose subjects were more playful and funnier. Nowadays, costumes, music, and good staging are valued above all. For good musical quality, either in singing or playing the instruments, a great contribution was given by the training received from the Regional Conservatory, folkloric groups, theatrical groups, philharmonic societies, and choirs (even that of the Church).

### A.9. José Eliseu Mendes Costa (1970–)<sup>42</sup>

José Eliseu Mendes Costa, who is now in his Fifties, is a distinguished *cantador de improviso* [improvisation singer] of Terceira Island. According to Borges Martins, he began his public singing activity when he was ten years old.<sup>43</sup> I crossed path with Eliseu when I was researching carnival papers at the Biblioteca Pública e Arquivo Regional Luís da Silva Ribeiro. I felt the need to interview him because I wanted to hear perspectives on Carnival from people that are renowned for *other* heritage-related activities. He kindly agreed to meet me the day after.

Improvised singing is a traditional Portuguese activity. It is divided in genres, which partially overlap. One of them is *velhas*: “it means ‘the old ladies’ and usually involves the exchange of jokes between two singers that make fun of old women, often ridiculing their supposed amorous aspirations or intrigues.”<sup>44</sup> *Velhas* are organized in quatrains. *Folias* is another genre, which accompanies religious ceremonies and could be either improvised or composed in advance—usually on behalf of a religious brotherhood [*irmandade*].<sup>45</sup> Finally, there are *cantigas ao desafio* [song duels]: they borrow their quatrain structure from popular mocking songs (*cantigas de escárnio* or *cantigas de maldizer*)<sup>46</sup> and place two or more singers—side by side—who exchange stanzas with a comedic effect.<sup>47</sup>

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<sup>42</sup> Costa and Marcelli, *Entrevista com José Eliseu Mendes Costa*.

<sup>43</sup> José Henrique Borges Martins, *Improvisadores Da Ilha Terceira*, ed. Liduíno Borba, 2nd ed., vol. 14, Coleção Improvisadores (São Mateus da Calheta, Portugal: Turiscon Editora, 2016).

<sup>44</sup> Thomas L. Avery, *Structure and Strategy in Azorean-Canadian Song Duels*, vol. 32, SIL E-Books (SIL International, 2011), 33, <https://www.sil.org/system/files/reapdata/10/13/89/101389487960399886656087437025573581042/sileb32.pdf>.

<sup>45</sup> Avery, 32:34.

<sup>46</sup> Borges Martins, *Improvisadores Da Ilha Terceira*.

<sup>47</sup> Avery, *Structure and Strategy in Azorean-Canadian Song Duels*, 32:2.

### A.9.1. Conversation

A: “I would like to start with a question not related to Carnival specifically, but to the learning of traditional activities that takes place on the island. For example, *cantigas*. What was the beginning of your career?”

E: “O yes. *Cantigas ao desafio*, which is what I sing, is a very lively tradition in countries that speak roman languages: Spain, Portugal, Italy, France as well... All those roman languages facilitate the part of lyrics and rhymes. So, this tradition came here with the earliest settlers from the mainland. It was a popular custom to joke between friends with rhymes. Rhymes had to be sung. I began to sing because my father liked singing. He could not sing, but he liked it so much he began to invite friends every weekend at our place. Therefore, I grew up affected by those *cantadorias*. Eventually, I began to try to make rhymes. There was a man who was brave enough to invite me to sing publicly in 1981. I was ten years and a half. Well, this process developed with highs and lows. Subsequently, when I was low, I kept close to singing... I had developed physically, but not mentally. My body changed: I had the body of a man, but in terms of brain I was still a child. So, I wanted to quit singing. But now it has been 40 years since I began, and I keep doing it publicly even today.”

A: “I would like to ask... what are the competencies for a person like you?”

E: “The main point is quick thinking. We have to think quickly. And, through such rapid thinking, we have to fill in quatrains that have a fixed structure: seven syllables in each line; the first line has to rhyme with the third one, and the second with the fourth one.”

A: “Like a chain?”

E: “Exactly. A-B-A-B. It is clear that the main point is quick thinking. Then, you need to have good ideas.”

A: “Ideas?”

E: “Yes, ideas. Hence, it is important to have good ideas and solid rhyming. In fact, in terms of sounds... Why am I telling you that? Because it is a matter of sounds. For example, in Portuguese, *mãe* [mãẽ/] is *M-A-E*, but it rhymes with *bem* [/'bẽj/]. So, you need to know that, to make a good rhyme—a perfect rhyme. Three things: quick thinking, good ideas, and good rhymes.”

A: “And do you just sing in public or also by yourself?”

E: “No, no, no. If I want to have fun, I do not think. There are things, however, that makes us enter another world: guitars [*violas*]. When the guitar begins to ‘touch,’ I shut down what is going on here and become another person. For example, now we are having a dialogue... but in that case, the dialogue is sung.”

A: “And are there always at least two singers involved?”

E: “Yes, yes, yes. Two singers and two players.”

A: “And what is the difference between *cantigas ao desafio*...”

[The interview is interrupted by a phone call]

E: “Sorry. Tell me again.”

A: “No problem. What is the difference between *cantigas ao desafio, velhas*...?”

E: “Yes. *Cantigas ao desafio* are Azorean, generally speaking, but there are some main cores in São Miguel and Terceira. The islands that are closer to these two enjoy these *cantigas*: Santa Maria [close to São Miguel], Graciosa, and São Jorge [close to Terceira]. Already in Pico and Fajal, though relatively close to Terceira, *cantigas* are not appreciated. It is a fashion. There is a genre of *escárnio* [derision] and *maldizer* [slander], which are more complex in shape than just quatrains, because they have two tercets and one quatrain at the end. *Velhas* are a specific custom of Terceira Island. And more: in terms of organization, it is one tercet...”

A: “Do you mean still with seven syllables?”



E: “Yes. It is called *redondilha maior*. And the stanzas are thusly organized: A-A-B, C-C-B, and then D-E-D-E. The latter is a typical quatrain. Way more complex. Also, the music is different. This one is in A minor [*LA menor*], while the other is in D major [*RE maior*].”

A: “Is there difference between urban and rural *cantigas*? Are you from a *freguesia*?”

E: “I am from a *freguesia*, yes. This tradition is markedly rural. The ‘city’ did not appreciate this, did not pay much attention [to the phenomenon]. I do not know of famous *cantadores* from the city—or maybe a couple of them, but no more. And even in that case, they were from peripheral urban areas. *Freguesias* of the farmlands... the rural world.”

A: “And what do you think of this? Why?”

E: “Because the city had an elite that was already acknowledged and had greater wealth. They used to send their children to school. They did not know the *freguesias*. Their culture was more erudite: theatre, classical music... Hence, it was different. Nowadays, it is all blended. Mostly because of José Orlando Bretão, who wrote a book on Carnival, so people began to read about the values of the *freguesias*. But, beforehand, the singers I was talking about had formed a group: the group of *velhas* and it was then that the city began to see them with other eyes.”

A: “What changed?”

E: “Mostly, what changed, was the fact two or three important people from the city that appreciated the singers: ‘this guy sings well’ or ‘he is very good.’ Why? Because the city likes to laugh. *Freguesias* love to laugh, but there is a team of people who would pay more attention to formal aspects: whether the rhyme was well-sounding, whether the quatrains were well-constructed.”

A: “Wow. So, the *freguesias* paid more attention to a well-constructed *velha*?”

E: “Exactly.”

A: “And how did you come to realize this?”

E: “In the old times, in *freguesias* there were few people who could read—namely, history, the Bible, and things like that. In the old times, the *cantadorias* used to sing the life of Jesus. So, people would listen as if they were at school. In the city, they perceived all this as a waste of time, because everyone knew those stories already. Hence, what they appreciated was not the story per se, but the mutual challenge with ideas for the bedroom [*ideias para cama*], taken from mud [*pilhadas para lama?*], taken from here and there. To laugh... and that is what the city was about.”

A: “So did the topics change?”

E: “They changed.”

A: “But do they change from *freguesia* to *freguesia*? Or from a *freguesia* to Angra?”

E: “In the old times, yes. Nowadays, there is not much left. *Freguesia* and city are mixed. Nowadays the paradigm changed because people already do not care to listen to a song concerning—I will make an example: concerning Benito Mussolini—people just want to laugh. Fun. Have fun. Nowadays *freguesias* are aligned with the city. They seek fun. There is, of course, always a group...”

A: “A group of critiques...”

E: “Yes. They stand still.”

A: “And do you think there has been a degradation of tradition?”

E: “No, no, no. Now I perceive that there is a new wave. A new group of new people who sing. They keep up the tradition. They like it.”

A: “Do you have young people? Even now?”

E: “This is the timeline: in the 1950s and 1960s, it reached the top; in the 1970s and 1980s, and maybe 1990s, there was a decline. In 2000s and after it began to rise again. Do you see that?”

A: “Yes [writes]. Do you remember situations in which *velhas* still had old stories, according to the old fashion? Or had they already disappeared as you began to learn?”

E: “In the 1980s there were still *cantadores* who would sing *á moda antiga* [in the old style]. They used to call them ‘*assuntos*’ [subjects]: for example, the subject would be describing the life of St. Benedict. And you needed someone who knew the story well. One would take up the subject and talk about that. Sing *cantorias*. Because, pay attention: in the *velhas* there is no system like that. *Velhas* were always filled with a certain eroticism.”

A: “But wait. Does it mean *velhas* are always funny?”

E: “Yes, they are always funny.”

A: “But in the old style... when singing the life of a Saint... was there a *desafio* [duel] between singers?”

E: “*Desafio* means two singers... who sing the life of a Saint (in this case) and describe his life in quatrains. One says who was his father. The other one tells of when he was born. Then the other tells what he did. Etc.”

A: “Always improvised?”

E: “Always.”

A: “Was there a tie with religious celebrations?”

E: “The Espírito Santo has strong ties with this. But there is another celebration... another custom, which follow the same structure: quatrains and seven-syllable verses. It is called *pezinho*.<sup>48</sup> *Pezinho* is linked to the Holy Ghost, and it is sung during the march, and then sung in front of the Império—which is a building that hosts the Crown of the Holy Spirit—in front of the Church, in front of the house of those who donated money to feed the people. This is

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<sup>48</sup> 2# *O Pezinho Da Ilha Terceira Açores*, 2021, pt. 00:27–01:01, <https://www.youtube.com/watch?v=hNQEW5wBwKY> José Eliseu sings the first quatrain in a *pezinho* that involves a streak of ten singers.

called *pezinho*, but it is mostly singing and walking, accompanied by guitars. So, for example, they come at your place, and they sing a *pezinho* for you: Andrea. Then they move on and, as they walk, players play philharmonic music—orchestra pieces. And when we get to another place, the orchestra stops playing, guitars begin to play, and we all sing.”

[I ask him to explain me this in drawing, on a piece of paper].

E: “We are talking of the *pezinho* of the Holy Ghost. There is a style, a way of doing: P-E-Z-I-N-H-O. Quatrains are A-B-A-B. The tone is that D major, if I remember correctly. And this is sung during walking.”

[The interview is interrupted by a phone call]

E: “Where were we?”

A: “But what type of path do they walk? Is it like the pilgrimage to Serreta?”

E: “Here, here. At the house of someone who helped the Império. Then they move to another house, of another man. The singers prepare and sing *cantigas do pezinho* at the door of the host.”

A: “And is he the *Imperador*?”

E: “He could be! But could be a donor as well. And here, in the back: there are guitars. And as they move to sing somewhere else... there is orchestra music. No guitars involved. *Filarmónica*. [writes the word on paper]. Then they arrive... and this whole situation I have already described is repeated. Guitars start again, and the group sings for the next host.”

A: “And who chooses the singers? The people? Is there a payment?”

E: “Singers, here, are paid for each public show. I was the first one here, because, at the beginning, I was the first one to do so with a business number. I went to the City Council and opened a business number. I was compelled to do so.”

A: “Was it an entrepreneur number?”

E: “Yes.”

A: "And you were the first."

E: "Well, there was no other way."

A: "And here... with the guitars accompanying the group... is there a symbology?"

E: "There is a type of guitar, which is unique. And it is this special guitar, in most cases, that plays for the singers."

A: "But is there another meaning?"

E: "The guitars?"

A: "I mean, this whole celebration."

E: "Not really. We sing during the feast of the Holy Spirit. In a *pezinho* you ought to be serious, because the Holy Spirit has to do with Churches and Império. No jokes, here."

A: "No jokes."

E: "The Church... or an Império."

A: "No shenanigans. It is a serious subject, I see..."

E: "And even when singers sing a *pezinho*, they try to thank someone. For example, there is a person that donated a bovine, a cow, an ox... which was slaughtered and distributed among residents... well, we visit him and sing for him."

A: "Now I see! Philanthropy."

E: "Now, it is clear that, when we try to thank someone, we might even add something concerning the individual we are addressing. But if we sing for the Church or the Império... it is different. But if we sing for a person, we might introduce some elements in the stanzas concerning this very person, or a friend... But, normally, it is a serious business."

A: "You told me that today everything has changed, and people do not like to listen to histories..."

E: "The music does not change much, but what we are gradually missing is the serious singing."

A: “Does it still exist nowadays?”

E: “Yes, of course.”

A: “And how many singers are there?”

E: “*Cantigas ao desafio*: always two.”

A: “But in the island? More or less?”

E: “Maybe twenty. Or thirty. Let us say twenty. And, of course, there are some who always sing; others who do that occasionally...”

A: “Is there at least one per *freguesia*?”

E: “Nope. There are some *freguesias* that have none. Others have two or three.”

A: “I have another question. Maybe an unusual one. Are there elements from the politics of the *freguesia* or the policymaking, which support *cantigas*?”

E: “Singers have always been people without power. People who did not pursue political goals. Singers are a class of people who never entered politics. They talk and sing of various topics, but it is rare to have them in politics.”

A: “Are there examples of singers that make a *pezinho* or a *velha* in a period of the year and then participate to Carnival or Bailinho?”

E: “Well, I do everything. I sing in spring. In winter, I participate to a *bailinho* of Carnival.”

A: “By yourself or with a group?”

E: “With a whole group.”

A: “What is your *freguesia*?”

E: “São Bartolomeu [dos Regatos].”

A: “Concerning Carnival, is there something you remember more vividly? Something that caught your attention? An event, an incident, a *bailinho*...”

E: “There was a *freguesia* that had its own Carnival. It was mostly based on theatre and stage. The music component was poor. There was lack of expert players. Attention was paid to

representation. It is clear that, in the Old Regime<sup>49</sup> there were challenges because the police and politicians tried to censor texts. So, *bailinhos* would introduce very subtle jokes—jokes people would understand, but not vulnerable to censorship. Singers are very tied to Carnival because of the texts. In a *bailinho*, who sings collaborates with other singers. I am not saying they were all involved in *desafio*... That is the theatre we make. You reckon?"

A: "Yes, I wrote what you told me. I was surprised because, like others, you told me about a rural life without school, with its own oral tradition... with very little literate people. However, in books I saw examples of Carnival writers or singers who were eruditos—even if they were poor."

E: "True. But you should take notice of the fact that all these people are self-taught."

A: "Do you think there was a motivation for such self-teaching?"

E: "There used to. Nowadays people do not develop many subjects. But in the old times there used to be at least a singer who would learn how to write and read because he wanted to talk, in his lyrics, of everyday things. Now I am running out of time. Would you like to hear from me on another occasion?"

A: "Well. At the moment, I am trying to organize all the data I have so far. Later I will contact you again."

E: "You will see me at the library, because I am doing research on the life of the Director of a Philharmonic... I am writing his biography."

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<sup>49</sup> The reference, here, is not to *Ancien Régime* but to *Estado Novo*.

#### **A.10. Secondary school teacher (female, 35–45 y.o.)<sup>50</sup>**

The following interview involves a female primary school teacher who asked to remain anonymous. The woman is native of Ilha Terceira and works in a primary school of the island, where she—among her other duties—delivers classes on the Azorean curriculum. The interview focuses on the explanation of how the Portuguese secondary school system works with special reference to Azorean identity in curricular classes.

##### *A.10.1. Interview*

A [after explaining the research subject]: “Do you have further questions on the research?”

T: “No.”

A: “So, my first question for you is: can you tell me about your role and what type of teaching you carry out?”

T: “I teach mainly [social science subject removed to protect the interviewee’s privacy] at the third cycle of primary school: grades: 7, 8, and 9. I touch on the curricular areas of ‘citizenship,’ ‘health,’ ‘history, geography, and Azorean culture.’”

A: “Is the subject called ‘citizenship’ because of a similarity with the European key competence?”

T: “There is a convergence. There is a convergence in the teaching of this at the national level, as well.”

A: “Is there a teaching plan concerning...”

T: “History, Geography and Azorean Culture?”

A: “Is it about Terceira Island, or more general?”

T: “It is more general.”

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<sup>50</sup> Anonymous and Marcelli, *Entrevista com uma Professora*.



A: “We have nine islands. We discuss geographical, historical, and cultural aspects. There are differences, of course. For example, we discuss language differences, differences in pronunciation. Even within Terceira Island there are differences: from one *freguesia* to another.”

A: “What does it mean, for you, to teach such differences? Is there a challenge?”

T: “For me? Well, we do a lot of learning by discovering. The point is that children do not get enough information on the islands. Everything they get in touch with occurs through the Internet, and this causes a loss of knowledge about the archipelago. But we use those media, as well as books, to stimulate curiosity about the islands. We also give space to students from other islands. We visit the City Council of Angra do Heroísmo and students have the opportunity to listen to its President. We do not focus only on our island, but also on the others. Learning through discovery means doing small works in class: for example, writing a short report that accounts for differences and similarities between islands. Their history, their habits... And this is how the Azorean identity is constructed.”

A: “Are there individualised projects? Is this education tailor-made for students?”

T: “It applies to everyone. There is a planning that is shared by all teachers who belong to this curricular area. Angra, here, is a wealthy city, especially in terms of heritage and history. Therefore, exploring Angra is the first task for our students. So, we not only visit the City Council, but we organize a trip of the city. We follow the most important historical steps, what is their relevance.”

A: “Is it touristic a bit?”

T: “Students need to be able to localize a monument in the city of Angra, describe it, and explain it in their own words. The output is a touristic brochure, which illustrates the monument chosen by the student to her peers and her teachers. This is a task that is not only

valid for 'History, Geography, and Azorean Culture,' but also for other subjects: literacy, IT education, history, geography."

A: "But does this respond to a curricular need? I see this subject is included in the general curriculum... but is it compulsory? Is it optional?"

T: "History, Geography and Azorean Culture. It is compulsory."

A: "Who made it compulsory? The government?"

T: "The school. It is a school decision. This theme could be dealt with in a cross-disciplinary way, that is, by involving different subjects. For example: geography. Geography is taught with reference to the entire planet, but we always relate to Portugal and the local context. So we have three levels: World-level, national level, and local or regional level. 'History, Geography, and Azorean Culture' is not really a subject, but a curricular area. The school had to decide whether to keep it. At first, planning took the shape of interweaving the curricular area with the subjects of History and Geography. That is, because the main contents are found in those subjects."

A: "Do history and geography teachers deal with this separately?"

T: "No. They do it jointly. There is an initial stage at Grade 7, in which priority is given to contents related to geography. That is, the geographical framing. Placement of the archipelago, placement of the islands, characteristics of every island, administrative divisions, issues related to the weather, most widespread flora and fauna... Instead, in Grade 8 and Grade 9, greater emphasis is put on historical contents. Therefore, as it is customary, in Grade 7 this Curricular Area is taught by a teacher of geography, while in Grades 8 and 9 it is taught by a teacher of history."

A: "I previously thought there was a single teacher for the entire curricular area..."

T: "No. There are several."

A: "How many?"

T: "In the curricular area?"

A: "More or less."

T: "Four."

A: "And how was it born? Who started it? You did?"

T: "No. It was a proposal of the Regional Department of Education, two years ago. Back then, they took into account the fact that the regional reality was not being sufficiently addressed by schools. So, since it is important, we require our learners to become experts concerning their own reality; since they live here, they should know what belongs to us. Know why and how things work. So, we make comparisons... otherwise it would be embarrassing to have someone who knows a lot about the world but nothing about her town, her land. It is thus necessary to create a space in which students could work on the local reality, the regional reality."

A: "Do you think it was necessary to do so?"

T: "It was an assessment of the Regional Department of Education. Back then, teachers of this school and of other schools of the region had a specific training concerning what was required when working in this curricular area. As I told you, it was mostly about geography and history. There was debate whether to make it a subject. But, in the end, it is not a subject, it is a curricular area. It is, in fact, a space in which students can reflect upon their region, their island, their *freguesia*. And I believe this is a supplementary way to make different subjects interact. This is a main worry: how to integrate different subjects, how to coordinate them. Beforehand, development was important [*inaudible*]. So, we opted to keep going with this curricular area, which elsewhere does not exist. And we also chose [...] to work in an integrated way, for example, by merging the subjects of geography and history; and science as well: integrate [the themes of the curricular area] into different subjects."

A: "Have there been outcomes? What was the impact of this?"

T: “Well, the learning of students.”

A: “But after the school?”

T: “Well, it is part of the evaluation. At the beginning, the impact I saw was the fact many students—in the many tasks they undertake—get to be very involved in the community.”

A: “So, there is a feedback.”

T: “They have as well to organise activities... maybe here at school, or, other times, elsewhere... for example, through the participation in a competition on Azorean culture. This is an activity that has been going on for 16 years.”

A: “Well before the creation of the curricular area!”

T: “Yes, yes. This competition has been going on for a while. It is a competition with questions on general Azorean culture. There is also a second stage: a competition between different schools of the same island. Finally, there is a third stage, the regional stage, in which students meet students of other islands and compete. The subject is always knowledge related to general Azorean culture.”

A: “Is it public? I would like to attend...”

T: “I see no problem in that. It will take place at the Escola Básica Integrada (EBI) of Biscoitos. There are some students from our school as well. I believe this could be an interesting activity that could display the regional dimension of education.”

A: “And does every student have a different topic? Do they get appointed a specific role?”

T: “The activity is connected to history, geography, literature, I don’t know... whatever falls within the notion of general culture. I think it is interesting because students, to participate, develop a deep knowledge of facts about the Region. [*inaudible*].”

A: “I am sorry, I did not get this one.”

T: “I said the activity is quite exciting for them.”

A: “And have you managed competitions between students?”

T: “Not really [*inaudible*]. I ensure they know more on Azorean culture. The competition, the trophy, is a stimulus. For example, the sheer fact of going to another island—or even Biscoitos—makes them want to ensure that what they have broad knowledge.”

A: “And do they work more for the competition than for classes?”

T: “They work more on knowledge. There is an enormity of information. Knowledge on [*inaudible*] different aspects.”

A: “Occasionally, in other countries I visited, there are curricular similarities. But, at some schools, this is carried out by external institutions. Instead here it is the school itself that organizes it?”

T [nods].

A: “Another general question, concerning the school but possibly external to the school. When you meet students for the first time... the first time you approach a new class... are there skills or competencies that are not developed by the school but which are possessed by students and developed by community life?”

T: “In a first class?”

A: “According to your experience.”

T: “I believe that, at the initial stage, we carry out basic scholarly duties. For example: you do not know the class you are going to teach. There are competencies that are more or less developed... You need a working plan, then... something that could develop the competencies that are less developed. Where to work more. For example, let us make an example from primary school. Suppose there is a student that begins his seventh grade. Knowing where his *freguesia* stands is important; it is important he knows how to talk about his world. But, at the beginning, it is important to know the groups of students and understand the competencies that are more or less developed and work on the less developed ones... not on those they already possess.”

A: “I understand. But are there things you *cannot* teach?”

T: “Things you cannot teach?”

A: “It is a general question.”

T: “There are subjects that cannot be mentioned at school. We try to widen the scope of our students, but some activities cannot be pursued. [*inaudible*] We try to make them aware of what exists in our land and what exists elsewhere—other countries, other areas of the world.”

A: “And do you believe the scope, here, is small?”

T: “Well, we are an island. There is no big scope here. Students begin to travel to other islands. Nowadays the people’s flow is greater. Even travelling to other islands, or Mainland Portugal, is a way to widen one’s horizons. However, this is not the type of project that enables us to widen the students’ scope too much. Take other islands, for example. Students participate to the regional government. We have a Parliament of the Youth. We also undertake a similar activity, here, at the school level. The Regional Assembly of the Youth takes place in Faial. Students can imitate the National Assembly [*Assembleia da Republica*].”

A: “What they do has an impact or is it just a simulation?”

T: “I am not involved in that project. But, if I remember correctly, they dealt with the issue of gender equality. We did it at the school level. Students make proposals, vote the best ones, and a group is selected (in the school) to present their proposal at the Assembly in Faial. This helps students to broaden their views, to increase their knowledge, and to develop competencies. Public speaking, oral interaction, writing... Relate with others. They also learn how to relate with students from other schools and other islands. And they can also participate Erasmus projects with students of other countries. I believe our school is on the right path to broaden the views of people and enrich them culturally.”

A: “Are there students from other islands that study in Angra?”

T: “Well, it is less frequent. People used to come here because there were no secondary schools in other islands. Now they do, so the number of students from other islands has declined.”

A: “How many are there?”

T: “I do not know. Few. Back in the days, when I was a student at this same school, we had students from São Jorge or Graciosa. Why? Because there was no Secondary school in those islands. So, they had to move.”

A: “And what do you think of such change?”

T: “I believe it was important. Students can spend more time with their families. Family context should be nurtured. Consider that school trains some aspects, but other education occurs in the family. It is also good to have an increased number of schools in all islands. Students stay closer to their families. There is more autonomy here. Of course, living away from the family forces students to adapt and to be more responsible. Nowadays 14 years old need to stay closer to their families. Moving would have a great impact on them. Nowadays they do not have to move away to study.”

A: “Are you originally from Terceira?”

T: “Yes.”

A: “Angra?”

T: “*Freguesia* of Ribeirinha.”

A: “I have one last curiosity. Is there a childhood memory of a festival, celebration, or event you would like to tell me about?”

T: “I regard myself as an unconventional Terceiran.”

A: “How comes?”

T: “I am a person that saw different cultures of our island. I was affected by my family—for example, my father always participated to the traditions of the *freguesia*. However, we would

go to Angra for the Espírito Santo. And then we have *touradas*... we are one of the few regions that still do *touradas a corda*. Then there are *Sãojoaninas*: the feast of St. John. My father always had roles in those.”

A: “Like a *mordomo*?”

T: “He has never been a *mordomo*. However, he participated the march of St. John. However, here there is the tradition... to be a *mordomo* you got to be male. Now we begin to see changes: this aspect developed and there are women as well.”

A: “Has it changed in the past 20 years or 10 years?”

T: “I would say 15 years. In the old days, a *mordomo* was mostly male. Now you see *mordomas* as well.”

A: “Occasionally, for me, here, it is hard to hear female narratives. Both because I am a man, but also because of some shyness...”

T: “Let us talk of administrative roles: the majority of Presidents of the *freguesia* Councils are men. However, you can already notice that things are gradually changing.”

A: “Where does this trend come from? Are these top-down decisions or bottom-up?”

T: “For the past autarchic elections of the Presidents of *freguesias* or the Regional House there was a bill proposing 50% male and 50% female quotas. That was the main concern. You can already notice that this worry is already widespread. In the city of Praia, after her candidature, a woman was elected for the first time in 2021.<sup>51</sup> In Praia, the new mayor is a woman. This is something that will remain in the history of our island.”

A: “Was it recent? 2020?”

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<sup>51</sup> Reference is to Vânia Ferreira of the PSD/CDS coalition, who was elected Mayor of Praia da Vitória in 2021. See: Lusa, ‘Nova presidente da Câmara da Praia da Vitória anuncia auditoria externa às contas’, *Açoriano Oriental*, 16 October 2021, <https://www.acorianooriental.pt/noticia/nova-presidente-da-camara-da-praia-da-vitoria-anuncia-auditoria-externa-as-contas-330996>.



T: "It was last year, 2021."

A: "The very first time?"

T: "Yes. First time. And now we already see some changes. More attention to women. Also: more women undertake key administrative and political roles. The same goes for feasts: we already have *mordomas*, who are women. Minds are more open about that."

A: "I am not doing gender studies. But I love to hear from all social stakeholders."

T: "In my *freguesia*, Ribeirinha, for the Holy Ghost, one of the three *mordomos* is, in fact, a woman. A great wave of changes is already on the way."

A: "*Mordomo*?"

T: "*Mordom-A*. Feminine."

A: "I would like to ask questions that are not related to your institutional role. At the end of the interview, I would like to ask you if you have an example of school planning..."

T: "I have a copy here, for you. It is not the newest one, but it has been approved."

[She illustrates me the nature of the document, which is included in another Appendix]

A: "What do you think is the greatest challenge for the island?"

T: "Sustainability. Because we need to preserve our heritage, what is *ours*. Either natural or cultural. Could be tangible or intangible. Our heritage is in decline. It is degrading."

A: "Already degrading?"

T: "Well, I am thinking in particular of the maritime activities. For example, tourist boats go around the island with the goal of watching whales or watching the island from the sea, but they impact the sea life where they sail. It is a matter of volume. They increase in frequency, and this causes a damage. Also, the more they are, the least the whales. They create crowds of boats. It is an issue of sustainability. Hence, we should worry and try to preserve what is *ours*. We have both individual responsibilities and collective responsibilities. Associations and administrations take collective actions."

A: "Thank you very much."

T: "I hope I shared information that is useful to you."

A: "It was very useful, thank you. Can I make a copy of your lesson plans?"

### A.11. Social worker (female, ~36 y.o.)

Fieldwork was blessed by a fortuitous encounter with a social worker who agreed to be interviewed by me, provided she remained fully anonymous. She declared being “my age” (around 36 y.o.) and identified as being non-cis. After meeting with her for the first time, I recorded the following field notes:

“So, I spoke with a girl my age. She works in social services but asked me explicitly not to disclose her identity [...]. She told me a couple of things about her work concerning a specific event that will take place tonight. As I spoke to some members of the Regional Department of Culture, I was made aware of the fact that I had to address the issue of violence on women—which unfortunately falls outside the focus of my dissertation... at least for now. How domestic violence is addressed. I mentioned to her of these conversations I had, and she told me she gets in touch with domestic violence on a regular basis, owing to her job. So, she suggested meeting me after hours and anticipated a couple of things. She believes there are very positive traits in the Azorean culture. However, the very intimate dimension of social networks, here, determines a code of silence [*omertà*]. Especially in the smallest islands. For example, if a man beats his wife, the policeman could be his friend and could attempt to tone down a report filed by the daughter concerning her mother’s situation. Who are you going to call? On the one hand, the State is absent; on the other hand, where the State is present, professionalism is lacking. That is exactly the word she used, to let me know there are situations in which crimes go underreported because of social consequences of a report. She also told me that the most recent incident was a leak of pictures of naked women: these girls took pictures of themselves and sent them to their boyfriends, but they did not respect their privacy and shared them with others. Eventually, someone published these pictures online. Authorities tried to tone down the entire thing and argued that, had they not wanted their pictures to be published, they [the girls] should not have taken them in first place. That is what she told me: there is a bullfighting society, here; it is close-minded, it is masculine... So, I expect an interview on such topics. However, I warned her: I am at an exploratory stage of my projects here, and I might have questions that lead away from such topics...”<sup>52</sup>

What follows is a rendering of our subsequent conversation, which took place in English.

#### A.11.1. Conversation notes

“The Island always felt very small. Adulthood brought awareness of the benefits of living in an island. Back then, it felt different. People were superficial, shallow. They lacked depth.

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<sup>52</sup> Andrea Mattia Marcelli, ‘About domestic violence’ (Field journal, 7 May 2022).

Everyone was just defending himself/herself. Mostly from their peers. Peers would not validate other people. The context was conservative but perverse: traditional life, almost bourgeois in attitude—yet supported by young people. Nerds were shamed.

I grew up in Angra. Angra is ‘small,’ not in size but in its ways of thinking. It lacks diversity. It is a place of conformity, instead of individual blooming. For example, the most popular people in my youth were the bullies, the playboys, the rude ones. Social inclusion was harder until some learning took place, because what I had to say was never considered to be ‘fine.’

There was widespread lack of freedom of thought. Being queer was unusual. Not as free as people think it is. Instead, alcoholism was seen as ‘cool.’ Doing drugs was ‘cool.’ [Side comment: the cliché is that drugs are celebrated by queer people but is it actually the opposite?].

In an ‘islanders’ sense,’ *this* is freedom. It is a ‘fun island,’ they say. A ‘gay island,’ where people move around and play. Instead, everyone hides a little bit [of their sexual identity]. Gays are not beaten up on the island, but they are clearly repressed. Well, to be honest, two of my gay friends got beaten, and pressed charges. But the problem is that the old bullies are now the watchmen of the community. They are homophobic. The community is homophobic. This is all connected to the tradition of bullfighting. [Comment: is she describing what Americans would call a ‘jocks’ culture’? Or: ‘locker room’ culture?]. Parents enrol their sons—the posh ones [*betinhos*] in particular. It is a micro-culture, an ecosystem. They have a feeling of superiority and expect much of their children. [Comment: she describes it as a frat culture, or *praxe*]. Girls are similar to boys. They would smash cars for fun, with the others.

*I became part of an initiation event:* students’ bullfight. Every year, students make rhymes and dress up and get drunk. They prepare ‘chariots,’ a bit like Carnival. I joined up to see how it was going to be like. I expected a place where criticism and satire would be welcome. Instead, there was a lot of groupthinks. Older students would punish and shame those who

did not comply. It was very oppressive. I was 14–15 at the time. I drew very well, so they used me to do the hard work.

*Drugs.* Alcohol is always the same. Winemaking. In Christmas, people drink a lot. There is a practice called *Menino Mija*: baby’s piss. The ‘baby,’ here, is baby Jesus. It is a practice that, in my opinion, mixes religion and profanity.<sup>53</sup> People visit different houses, and their goal is to get drunk. The goals are the same for the youths and the elderly. For me, a religious holiday is about purification. So, there is some hypocrisy here. Or at least this is my opinion. You now, priests here get very rich. I believe people confuse religion with different things. I would rather have more clarity—also considering the fact religion is not real.

Again, about *drugs*, I can tell you there is a lot of *heroin* going around. I will go to the extent of saying that the Alentejan Region and these Islands are the areas with the highest ratio of heroin users. The problem is that there is no competition between drug dealers. So, they ‘cut’ drugs with whatever they want. No competition means no quality control on the drugs being sold to end users. Also, *cocaine*. It has always been in fashion. *Ice* is new, here. There is also something called *branca sintética* [synthetic ‘white’], which is basically fertilizer mixed with other things. It has a very strong effect, and it was easily purchasable—at least until March 2022. Now people are turning to heroin, because it works as an antagonist substance. But the only socially accepted drug, here, is alcohol.

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<sup>53</sup> Systematically, the interviewee used expressions such as ‘*pagão* [pagan, heathen]’ instead of ‘*profano* [profane].’ I translated ‘*pagão*’ with ‘prophane’ because she confirmed to me that she believes the people she describes to be “fully Christian.” Therefore, they cannot be ‘pagans’ in the historical sense of the word. However, her usage of *pagão* betrays a judgement about these people’s inability to detach the dogmatic aspects of their faith with fun and non-religious past-times. Therefore, she concludes they *are* Christians but *act* un-Christian. Therefore, I felt it was necessary to explain her usage of the word *pagão* to reflect the ambiguity of her attribution of faith to her peers and fellow islanders.

*Sex.* There are religious celebrations linked to feasts. [Comment: unfortunately, she does not want to elaborate on that]. You ask me about sexual rituals? As far as I know, it is accepted boys have more dates than girls. But nowadays girls are more liberal. However, they are bad-mouthed if they have too many boyfriends or are just friends with guys. My grandmas would slut-shame me to protect me, for example. Do you need other information?

*Crimes and festivals.* Well, as far as I know, most crimes occur under the influence of illegal substances or alcohol.

*Art.* There is a new school, here, which is called Escola Básica e Secundária (EBS) Tomás de Borba. It focuses more on technology and globalization. It attracts people from other islands and anyone who is non-conformist or unconventional. Ten years ago. It has a conservatory. This school joins together different subjects (secondary school) but it is overall a comprehensive institute.

*Puppets.* Here we have the *Robertos*;<sup>54</sup> however, they are widespread in all Portugal, not just the Azores. *Robertos* are used to talk to kids about sensitive topics, such as sexuality, crime, ethics.

*What surrounds touradas.* Bullfights on the streets were usually followed by Philharmonic Societies' performances and *cantigas*. Now it is way rarer. You know, *cantigas* are a sort of 'Terceira rap.' I can tell you some gossip about two of the major singers of our island: Turlu (f.) and Charrua (m.) had a relationship, but at the time few knew about that.

Coming back to young people... I noticed a lot of lack of empathy. Young people know agriculture, farming, how to take care of animals, how to fish, etc. So, there is an

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<sup>54</sup> *Robertos*: Portuguese-style puppets, which reproduce comedy-of-art characters. The most prominent character is called Dom Roberto, and gives his name to the entire genre. See Christine Zurbach, 'Dom Roberto Theatre', in *Séminaires PuppetPlays* (International Seminar of the PuppetPlays ERC Project, Online: Université Paul-Valéry Montpellier 3, France, 2020), 1–15, <https://doi.org/10.34847/nkl.8ebbz96l>.

intergenerational thread in this sense. Hands-on skills. People take responsibilities. They have a lot of roles: you have to be ‘multitasking’ and be creative. However, in terms of leisure, there was not much to do. In my youth, parties were rare, so I would organize my own. For four times I had a little festival with my friends, in which we would exhibit our creative production (art, paintings, songs with ‘open mic’). Sometimes we gathered up to 300 people. In the mainland [*Continente*], Islanders binge on life. Then, they go back to the ‘old ways’ as they return to the island. This means they try everything. They are over-stimulated when they go to the mainland. However, they bring home very little of what they experienced elsewhere. To be free... they prefer to be free.

At the workplace, in Terceira, there is less professionalism. A lot of gossip going on. Little chance to benefit from confidentiality. For example, medical details should remain confidential, but the doctor talks to his wife, his wife talks to her friends, and so on. Additionally, there is little availability to psychiatric services.

*Justiça da noite*. Before close fields were introduced in Terceira, this type of justice was a way to protect the land. People stealing cattle and committing abuses (e.g., on a child) would be punished. People would wear white linens as masks and no shoes (to avoid being recognized). These are the two faces of anonymity. I read a book about that. It was full of interesting information but not very well written.”

## Appendix B: Miscellanea

This section collects notes that are relevant for the scope of the dissertation.

### B.1. A stroll in Santa Bárbara<sup>1</sup>

I have just discovered my recorder does not work very well. I walked towards the harbour of Cinco Ribeiras. Then I walked back through another country road, and I ended up far away from my destination, as it had already happened in Biscoitos: downhill to the seaside, but uphill to go back. Usually, through all those little country roads bordered by dry stone walls.

I encountered a lone fisherman, which I did not want to bother and, later, some farmers, who were busy with their cows. Close to Santa Bárbara, I met an old lady and broke the ice by asking her the hours of the mass.

She told me about the parish priest. I mentioned my interest to ask him questions about Terceiran culture. I should have asked her, instead of mentioning others! But I did not want to disturb her: it was *her* Sunday morning, after all! Anyway, she kept me talking for roughly ten minutes, and it emerged there is only one parish priest and only one mass, at 11 am. On the Internet, I had the impression that a series of priests would take turns in the *freguesia*, but, apparently, I was wrong. She told me the parish priest keeps to himself, mostly. Therefore, she suggested to me that I should stop him as he moves from the Church to the sacristy—as many do when they have to pay stuff and ask favours. She also told me it is more convenient to see him on weekdays, because Sunday's mass is very solemn—and sung. Instead, weekdays have masses at 5 or 5:30 pm.

The old lady was very kind with me. I felt I have broken the ice.

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<sup>1</sup> Andrea Mattia Marcelli, 'A stroll in Santa Bárbara' (Field journal, 1 May 2022).



## **B.2. At the radio station<sup>2</sup>**

Another diary entry. I was in Santa Barbara and found a radio station—a newly opened one. Well, maybe that is wrong. Fact is, I found a radio station with an open door. The door was in a council building and the radio station was upstairs. A sign said there was an exhibition, so I entered. It was about 9:30 o'clock. This radio station was placed in an ancient house, very elegant. It even had a small bar and comfortable sofas. In the main room there was a glass that separated the actual studio from the lounge.

I spoke with the announcer, who is also the manager of this radio. I did not ask him for his name, but I believe it is very easy to find that radio on the Internet. With the excuse of the exhibition, which was in fact an exhibition of t-shirts decorated by a local girl, I explained to him I was an anthropologist, looking for contacts. At first he did not get it, but then he told me he has a colleague my age, who is an anthropologist as well, and manages a radio show together with a lawyer.<sup>3</sup>

Then he told me about the radio.<sup>4</sup> Rádio Voz dos Açores (RVA) was born in 2012 as an online radio for all those who... I mean a radio with no broadcasting tower: a web radio... which catered to the needs of the Azorean community abroad: mostly United States, Canada, and, apparently, a Norwegian-Azorean community. The announcer explained to me a former colleague of him, who was an [Evangelical?] priest who later left his role in the Church after a re-conversion, had moved to Norway and had helped him to manage the web radio. Therefore, we have characters such as these, who are very fluid, who manage to be priests, radio announcers, and maybe have other jobs as well.

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<sup>2</sup> Andrea Mattia Marcelli, 'At the Radio Station' (Field journal, 1 May 2022).

<sup>3</sup> I tried to reach out to him, but he never replied.

<sup>4</sup> Lena Sá, 'Sobre', Radio broadcasting website, *Rádio Voz dos Açores* (blog), 2016, <https://www.vozdosacores.com/sobre>.

The announcer told me he works with a network of Azorean radio stations for people abroad, of which they represent the Azorean branch.<sup>5</sup> Aborad... because the headquarters of this company is in the United States. Nonetheless, he told me he broadcasts in Faial, São Jorge, and other cities and local islands. But, above all, Portuguese people in the USA listen to it: California, New York, Toronto (Canada...), and so on...

What happens next? He explains me a couple of things. So, I try to explain *my* inquiry—but since my research protocol is still at its early stages and since my Portuguese proficiency is far from being excellent, I spoke confusedly, so he asked me: “But who are you exactly looking for?”

I replied I was looking for anyone who had a bit of experience about Carnival, especially in contemporary age: historical research is already out there, but I was looking for a contemporary perspective. I emphasised the need to focus on the past 30 years, to account for cultural change on the Island.

Then, he took me to the bar and offered me *aguardente* [wine spirit] with cinnamon. I asked for a coffee, because it was 10 am in the morning, but he really wanted me to try *aguardente*—and got himself a glass as well! So, I tried to break the ice again by mentioning the fact I come from a region of heavy drinkers (Veneto).

While sipping, I tried to illustrate to him an example of the investigation I am carrying out. To be honest, it was not even my investigation but rather my *interpretation* of data collected by others: *vamos por lapas*.

Hearing the word “*lapas*,” he asked me if I had tried to pick them up. I answered I had not had a chance to. So, he began talking about *lapas* and explained to me there are also *cracas*,

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<sup>5</sup> Média Group Diáspora, ‘Quem Somos: A nossa equipa, tem mais de 200 anos de experiência Rádiofónica’, Media company website, *Diáspora Média Group, Inc.*: ‘Uma voz tão perto do Mundo’ (blog), 2022, <https://www.diasporamedia group.net/about>.

which are like *lapas*, but with a conic shell that “looks like a volcano,” and whose mussel should be eaten with a special fork. He recommended to visit São Mateus, which, in his opinion, is a *freguesia* with strong ties with the sea: once there, even if I do not want to have them, I will be able to at least *see* them.

At that, I answered that that was what we usually ‘discover’ in our investigations. For example, that the sea used to be a source of wealth and survival, and now it is experiencing some challenges. I also exposed to him the view that, back in the days, one could take from the sea what she wanted, whereas now kids are taken to *lapas* just to illustrate a point on biodiversity.

This triggered some clarifications on his behalf. First of all, he explained to me that there is a legislation that prevents picking *lapas* in some periods of the year—when they reproduce and grow. This legislation anticipates a period of collection.

The second thing he told me, is that this is a happy age for fishermen. He explained that the poorest people on the island used to be fishermen and farmers. There was no money around and these were poor jobs. In particular, those who used to pick *lapas* were people with no capital and no means—sometimes not even shoes. These people used to venture close to the sea, on the cliffs. And he starts telling me a sort of legend.

“How comes?” I asked: “Was it dangerous?”. He nodded: some people died. These people would venture on the cliffs even when the sea was rough. For example—this is the legend—in Doze Ribeiras the cliff is very high, but with cracks and passages. So, people would venture down the cliff even with bad weather and never came back. What happened is that these people would put *lapas* in baskets in their backs and would go around the village.

I asked if they would sell them at the market, but he told me that there was no market. They used to sell *lapas* on the streets. Either people stopped them on the streets, or they would

knock at each door and barter *lapas* for something else. Of course, they would show up at feasts because there were more chances to sell their stuff.

By telling me this, he paints a fresco of the island as a peripheral reality, living on agriculture and fishing. Peripheral, but essential. Why? Because it would make a living by selling food to the bourgeois in the city.

Selling was no easy deal. It could take hours to get to Angra. Farmers would grab their ox-driven cart (if wealthy enough) or donkey to reach Angra.

“You know—he tells me—here there used to be elites.” What did he mean by this? He meant that there was a divide between town and countryside. However, he also informed me that things have changed now. There is more education, communication, opportunities... and since things are better, now, people have lost interest in the old ways. For example, *lapas* are now *very* expensive. 10-12 Euros per kilogram. In the past, they were the “poor peoples’ food.”

When we spoke about that, we spoke of Carnival as well. We spoke about *bailinhos*, for example. He confirmed to me that there is value in them. There is value. Visiting as much of the island as possible with a single *bailinho*...

He informed me that in Ribeirinha and Biscoitos, but technically also in Lajes, there is a wealth of theatres. Each of these *freguesias* has more than one theatre, which means *bailinhos* perform even *twice* in the same *freguesia*. He told me that the urban carnival, as well as that of Faial, Corvo, and São Miguel... are different. For example, he told me that the Carnival of São Miguel is a posh event, that takes place in a theatre, and where everyone is well dressed and elegant. Like a prom.

Here, in Terceira, it is a folk event. “Do not expect high quality” he told me: most of them are amateurs, but they enjoy themselves a lot. There is a lot of *bravado* [showing-off] going on, such as when a *bailinho* boasts the number of stages they have performed on. He told me that

*bailinhos* have a strong network: if you invite a *bailinho*, you must invite its friends as well. This multiplies the number of invitations.

So, I asked if there are conflicts. Actually, I tried to touch it lightly and asked if there was competition going on. At first, he was vague, and told me that competition is now almost over. However, he told me that in the past, in Porto Judeu, there used to be two Philharmonic Societies—the cornerstones of *bailinhos*—and could assure me that the orchestras of Porto Judeu were a bit like gangs, which would have occasional fistfights with each other. They would challenge each other. Metaphorically speaking (but not so metaphorically), you could have competition between the frequenters of two bars, standing opposite to each other on the same street. Fistfights occurred, but now it is all more civilized and there is more sensitivity. A single Philharmonic has been created by merging the two opposing ones and its youngest members have no memory of the old grudges.

He told me that, instead, in Ribeirinha there are no fights, but the impression is that the two societies do not talk to each other: separate theatres, separate parties, and so on. Maybe, the heads of the Philharmonic Societies might not be in touch. However, he reassures me that such gangs and such violent outbursts are things of the past.

Later, we spoke of *touradas*. He told me he does not like them too much. So, I asked him if there are more people that like bullfighting than people who dislike it. I asked him of animal welfare, as well. He told me that bullfighting goes against his sensitivity, but it is hard to even criticize *touradas* because many love them and some are even freaks. Who likes *touradas* tries to go to *every tourada*.

This will be very relevant in 2022 because, even if the traditional period goes from April 30 (or May 1) to September 31, now the period has been extended, as a post-Covid measure: from mid-April to mid-October.

Fact is, *tourada* means a confusion and mistreating a bull. I asked him about the bullfighting in *praça de touros* and he told me that, here, it is worshipped as Italians worship football. So, I asked him how it works. What did he think? (I made clear to him that I try not to take sides because I study culture but, in fact, I have my own feelings about it).

He answered to me that the topic is delicate, and I should not openly criticize *touradas* otherwise people will get angry. I then asked if there is a benefit for the *ganaderos*, and he was very surprised by this question and informed me that there is no philanthropy in that. The *ganader* does not earn ticket fees—there are no tickets to attend—but organizes everything.

Maybe the Council of the *freguesia*? Not at all. Portuguese authorities regulate the usage of public space but have no role in the organization of bullfighting. Bullfighting, here, is not forbidden, but it is not participated by the authorities. To organize bullfighting, all the local inhabitants pay a fee or donate. The donation is either used to cover the *ganader*'s expenses, or to feed the bull. In exchange, the *ganader* gets to keep some of the money. He is also rewarded if his bulls become renowned. This leads to another notion of competition: not during the bullfighting, but between *ganadarias*. Cattle breeders are like presidents of sports clubs: they want to ensure the bull is well fed, they hire a trainer for the bull, they train their own *forcados*—well, not really *forcados*; in the streets, it is *pastores* who cope with the bull. So, they get a fee from the locals—especially shopkeepers, who apparently make a lot of money at each bullfight.

*Touradas* are not single events. They are bundles of events. Together with a bullfight you will see a rock band playing by the side, or some *cantadores* performing a duel of improvised songs. It is a feast; it is a fair. People who attend, who come from other *freguesias*, tend to spend, to eat *bifanas*, drink a couple of things... and, basically, they make the *freguesia* wealthier. In exchange for an early investment, the *freguesia* makes a profit.

*Lapas* sellers, back in the days, would have gone straight to one of such events, where money is to be made. Therefore, it sounds like a business: the business machine produces added value *on top* of the *tourada*. There is also leisure, but business as well.

All the above issues are extremely intriguing: people disappearing at sea, business around *touradas*, competition between different parts of the same *freguesias*, the relationship with other islands, the elites, the poverty of fishermen... and so on.

### **B.3. Encounter with a taxi driver<sup>6</sup>**

Taxi drivers are another recurrent presence on the island, especially near the airport and the city centre of Angra. With fares averaging roughly € 0.50 per kilometre, even extra-urban routes are made affordable for tourists and businessmen. Moreover, given bus rides stop early in the evening, taxi rides might be the only way to reach one's accommodation.

Taxi drivers became relevant when I met a potential informant among them, who was eager to answer questions about his youth in the Azores. Our talk went smoothly even if he had a tendency to stop holding the driving wheel when explaining things in the most excited way.

Fact is, job opportunities were scant in his home island—São Jorge. But the reason his family moved to Terceira was the psychiatric disorder of one of his siblings. Hospital facilities and services were then available only on Terceira, which is the second most populated island of the archipelago. Therefore, the family embarked on a ferry and sought accommodation and jobs in Terceira. It was there that my informant eventually got a driving licence, which would prove the most useful skill (and certification) in the long run.

I asked him of the Carnival. He used to be an active participant but, at his current age, he is now unable to play his instrument properly. What type of instrument? The trumpet. He was a

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<sup>6</sup> Andrea Mattia Marcelli, 'Encounter with a taxi driver' (Field journal, 2 May 2022).

member of the brass section in one of the many local bands that participated the carnival shenanigans. But what about São Jorge? There is a “carnival” there, as well... but not as “developed” as the Terceira one.

This led me to the conviction some of the smallest islands might have continued to hold festivities without experiencing the change determined by a booming population and an increasingly complex society (technologies, transports, etc.).

#### **B.4. About another taxi driver<sup>7</sup>**

I am relaxing, so it is time to record events before I forget them. The situation has been positive, both yesterday and today, even if I believe I have not managed to pull all the strings I wanted. So, tomorrow the plan is: in the morning, I will tour institutions and some primary schools of the area; secondly, I will go back to Cinco Ribeiras and began to make roots there. Well, technically it is not even Cinco Ribeiras, but Santa Bárbara. Eventually, I will try to interview the parish priest of Santa Bárbara. That is it.

Now let us talk of the most recent things. I am travelling with the ‘usual’ taxi driver. I say ‘usual’ because there are several old taxi drivers. In August 2021 I had experienced travelling with a very old one who was struggling at the wheel. This one is better, but I saw him struggling as well in some narrow roads by the countryside. These people work a lot.

This one told me one of his grandfathers (he did not specify which one) used to live in Cinco Ribeiras and was a fisherman. So, I asked him some questions, but he told me he had never met him.

It took me a while to ask about internal tourism. Well, not just internal: where do Azoreans go when they go on holiday? He told me: in the past, they were emigrants, not tourists.

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<sup>7</sup> Andrea Mattia Marcelli, ‘About another taxi driver’ (Field journal, 2 May 2022).



America (Canada, US), Sweden, and Brazil. Nowadays, people travel across islands. All islands have fairs and feasts, so that there is an inter-island tourism *by* islanders. It represents an opportunity for them.

I am recording this because he used an expression I really liked. He told me it is a way to “*sair de terra*” [leave the land]. He did not say “leave the island,” or “leave Terceira.” He said: “leave the land.” As if ‘Terceira’ and ‘land’ were synonyms. Your island of origin is *your land*.

It is not a folk theory, but such expression made me think that maybe, in some sense, Carnival itself could be a way to ‘exit the land,’ that is, to escape in a world of fantasy. So, I asked him whether he had ever participated the Carnival. He told me he never participated and did not play an instrument. For him, Carnival was mostly a distraction. However, people travel a lot during Carnival.

I objected: “there are not many tourists during the 2020 Carnival.” But he did not get the full statement and replied to what he understood I said. But this reply is interesting nonetheless: “Tourism here has existed for about 20 or 30 years. How comes? There was no tourism beforehand. All were migrants. The island was very poor.” I asked if he often visits other islands... he does not. He gave me the impression he visited Graciosa once because he told me about ships—after we saw a cargo ship in the distance. He told me that ships are ordinary views because the Azores are at the crossroads of major trading routes: from Brazil, and from Africa to Europe. He told me he was in Graciosa once and saw a cargo ship with field glasses. He said it was one of the biggest he ever saw.

Well, we did not discuss much. But I have to add something: I paid way less than expected. Consider the following: I got picked up in São Mateus and got off in Cinco Ribeiras. I had a shower there, and he waited for me. Then we went back to Angra: another 10 km. In the end, I paid 15 Euros. It is very cheap here and he did not want more.

### B.5. Bullfighting attendance<sup>8</sup>

Considerations after the street bullfight. *Tourada á corda* is a very unusual event. We should cross the information given to me by a Russian-Lithuanian girl I am currently dating and what I saw myself.

She told me that, when she attended *tourada* in Santa Bárbara—that is, the *tourada* I missed because I had just landed—she saw the President of the *freguesia* Council entering the main square on a chariot pulled by horses and dressed like a “Spanish bullfighter” (her words). He greeted the crowd, “blessed” the bullfighting, and it all started.

However, she told me there was none of the activities I had been anticipated at the radio station: no *cantadores*, no rock concerts, etc. He had told me otherwise, but it seems *tourada* in Santa Bárbara is not homogeneous.

Anyway, *touradas* started early, this year, to make up for Sars-CoV-2 restrictions. People told me everyone was crazy about that. People wanted the bulls! So, let us start with Santa Bárbara: there were only food and drinks.

Yesterday, I attended a *tourada á corda* in Posto Santo, closer to Angra. It is a *freguesia* on the hills. I got off from my taxi (and the driver did not feel like chatting with me). I am trying to think if he told me something interesting... not really. Maybe this time I found someone more silent than the other ones.

Posto Santo is a crossroads of three streets. Surprisingly, the four containers holding the bulls had been placed straight in front of the Império. I did not expect that. These are metal boxes with the bulls inside. A long rope is already tied around the bull’s neck and the *pastores* begin pulling it even before the bull is released. *Pastores* are dressed in white shirt and

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<sup>8</sup> Andrea Mattia Marcelli, ‘Bullfighting attendance’ (Field journal, 2 May 2022).

trousers, and they have a hat that reminds me of that of Gondola rowers in Venice.<sup>9</sup> So, they are herdsmen [*pastores*] but look like sailors.

As they pull the rope, the container is opened and the bull rages in the streets. Sometimes they are pulled in a direction to ensure the bull tours all town. Let us say that there are three streets, arranged like a letter 'Y.' The bull is not pulled towards the shortest branch, because it has less houses. Instead, it is made to tour the other two branches. On the streets, a white line is drawn, and that is the point up to which cars can park. There is more than one line: a first safety line, and then the actual 'enforced' line. Of course, there is always a chance the bull breaks free and hits cars and buildings. However, it is regarded as an unusual occurrence. Behind the white line there are also gumbo trucks, that is, street food lorries that sell all things food and beverages. In my opinion, they are not very clean, but I ate anyway because I was too hungry to care. One of them was managed by what I identified as Bengalese people. Others were managed by Terceirans. Some trucks offered boiled eggs or tapas. I thought dishes were on sale. I saw people drinking equally beer or red wine. To profit more from position, some street food trucks had placed themselves on the parking lanes of the biggest houses—possibly in agreement with the landlords.

After the line, which was monitored by a single police officer (maybe another one was on the other street, the uphill one), people begin to squeeze. All the best spots were already taken when I arrived: top of the walls, the fences, a grassy hill with a stone wall dividing it from the street... Potentially, the bull could have run up the hill, but there was some semblance of a barrier, so people apparently felt safe. Beyond the hill, people were sitting on the fountain, or on other fences.

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<sup>9</sup> I was overthinking that: it was *just* a traditional Portuguese felt hat.

I saw young people reaching safety through very athletic jumps. The locals did not care much about where people sat.

My issue was that, given all the best spots had been taken, to see the release of the bull I had to place myself at the very centre of the crossroads. But, again, all the safest places had been taken. Meanwhile, the *ganador* was standing on the stairway of the Império, and, next to him, there was another street food shag, which was shielded by many wooden barriers. I perceived those sellers to be the ‘friends’ of the *ganador*. The *ganador* was the boss. He would utter very few words and keep to himself. As he was quite old, he helped himself standing with a walking stick. Occasionally, one of his henchmen would turn to him for instructions. One of the henchmen, in particular, was in charge of managing the whole thing on behalf of the old man. Like a boatswain, he would shout orders and occasionally sip a glass of juice. He would work a lot on the containers (e.g., by inserting ropes).

Dwellings with the weakest or shortest fences had reinforced wooden barriers, to prevent the bull from jumping in or crushing the fence. I also saw some ugly wooden barriers that had been thrown *behind* the fences... as if they had been discarded. Some barriers were fancier: they were painted red with a big white circle in the middle. This colour pattern, I have been told, is more traditional than functional. Maybe the shape triggers the bull into something... but I am pretty sure the fact bulls charge red things is mostly a legend.

What happened next? To protect an ugly trail that departed from one of the main roads to follow the course of a creek, organizers had placed an orange lorry with an open trunk. One of the sideboards of the trunk had been lowered—and it was the one facing the bull!

I inquired. I met a person who told me he was Terceiran but had grown up in the United States. He would come back regularly to join family and take some pictures. In American English, he explained to me that the lorry was deemed “sufficiently” safe. After all, he pointed out, it was full of elderly people.

I stared at the elders and realized some of them seemed to me to be ten years older than they actually were. Some of them had seriously ruddy faces—possibly because of the many drinks they had. They all told me it was going to be all right. But they also invited me to lean against one of the house fences. They deemed it okay for me to stay there... and they assured me it was “safe, provided the bull does not jump.” Do bulls jump? I asked. “Occasionally.” Hence, I was standing with my feet on the lorry and my back against a fence. I braced myself.

After the bull was released, I realized what they meant. On the street there was a young man standing. He had come earlier, and I remember seeing him walking towards the crossroads when I was on the taxi. He was about 30 y.o., quite small, but very resolute. When I had seen him for the first time, we exchanged a quick stare and I noticed he was holding something that looked like a folded banner. It was, in fact, a bullfighting cape [*capote*].

When the bull was released, I saw him challenging the bull with both the cape and an umbrella. The umbrella could be opened to act like an additional cape or be used in place of a sword. I saw a function, in this: when a bull is released, it is not immediately raging against the crowd. The first bull I saw was very confused and would stand still and stare. Therefore, a man was needed to whip it up. The youth was the man of the day.

I suspect he was a trained *toureiro*. And this might defeat what *forcados* had told me last year, that is, that people who play in *praças* do not mingle with people who play on the streets. *Forcados* were very elitist, in this sense.

Later, after some exchanges with the bull, the beast began to charge more steadily and the *toureiro* suddenly jumped on the lorry. That moment I realized I was surrounded with old men dressed in red, and the bull made a very solid attempt to pursue him *over* the lorry. Everyone ran. I jumped on the top of the fence, and held a stone column. Problem is, the ground *behind* the fence was way lower than the pavement of the road *in front* of the fence, so I had to hold tight to avoid falling three metres to the ground.

Eventually, the *tourada* evolved into a quite boring exercise of holding, jumping, and then waiting. The first bull was not very active. Eventually, *pastores* had to bring it back to the container because it had lost one of the leather caps that are used to cover its horns. It was then that I realized that its horns are not shaved (like arena bulls) but merely covered with a leather or bronze cap. Lack of caps means the bullfight cannot proceed. I believe the reason horns are cut in the arena is that *forcados* run against the bull to stop it. There is no such thing on the streets. People just flee.

What happens? When the bull is ready, a loud firecracker is started, so everyone knows that the bull is being freed. People tend to stand on the street until last minute, then they escape towards the white lines or towards the roadside fences. The *toureiro* is not always there: sometimes it is the youngest who challenge the bull. These people jump really high. I saw a guy throwing himself in a terrace where women and children were sitting. The mothers laughed at him, and he risked a lot.

At some stage, a bull hit an old man. This old man was on my same fence, except I was behind hit, and he was just hanging in front of it. The bull hit him and threw him in the air. He fell with a loud 'thud' and everyone rushed to the street to distract the bull. Then, the old man stood up, cleaned his jeans jacket, and realized what happened. Some blasphemies followed and he opted to go and drink even more. I really hope he did not have a concussion. He looked extremely sturdy, but him being hit was a tense moment, nonetheless.

Another information that was reported to me by my Russian-Lithuanian informant is that, at the end, bulls are left out for a very short time. They are quickly lured back to their containers. A break follows, and people drink and cheer.

Honestly, I must confess the bull constitutes the interesting part, but there are long waits between one bull and another. I have also been told that there are *five* bulls. The fifth bull is *booze*. The taxi driver stressed: the fifth bull is the most dangerous one, because it knocks

you down. During the break, traffic is allowed on the street. People laugh, joke around. Drinking is clearly what boosts the event, otherwise it would be all very boring.

At some stage, some bikers arrived, with leather jackets and motorbikes. They had a motto on their back: “few but good.”

This is my relation on the *tourada*. Then I walked back to Angra because I have another ‘date’ with my ‘informant,’ at her hotel. Maybe I should spend a couple of words on the hotel: she believes it is old-fashioned but I believe it is cleverly built. It provides a seaview for all guests and, at the same time, its land does not overlap with the seaside trail. Maybe it is the best on offer on the island. This hotel offers a lot of services included in the price: tennis courts, swimming pool, and gym. I think it dates back 1980s.

## **B.6. Cultural life in Terceira Island<sup>10</sup>**

I asked [my last contact] to clarify what cultural life is like in Terceira Island. He told me it is not comparable to that of Lisbon. Light years from it. Lisbon performs above expectations. Instead, Terceira has another benefit: it is all close-by, so you can attend different cultural events—unless they occur at the same time. In that case, a problem emerges. If some things are done after 8 pm, people do not attend it. Instead, if it is done immediately after work (e.g., 6 pm), they overlap. This creates some sort of competition. There is not always a mediation in this sense, which facilitates attendance.

Now, let me check. I am crossing through the town. He told me: events are diverse, but what does not change is the audience. That is the example he made: suppose you go to two book presentations, one on Friday and the other one on Saturday night—which is also ‘night at the

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<sup>10</sup> Andrea Mattia Marcelli, ‘Cultural life in Terceira Island’ (Field journal, 10 May 2022).

Museum' day—you end up seeing the same people. You end up having met everyone. Partly because there are no alternatives and partly because everyone knows everyone.

### **B.7. Emotions<sup>11</sup>**

I will take the chance to make another recording. I spoke with an old man in São Bartolomeu. The television was broadcasting news of a boy that had disappeared in Mainland Portugal. Parents were being interviewed. So, I inquired: has a boy disappeared? He replied to me that he had disappeared 24 years ago. Hence, I answered I saw it hard for him to be retrieved. It looked difficult to me. He told me that is the way things are.

He told me other things I did not understand. However, there is one thing I understood. He was really sorry for that incident. He explained to me the boy had disappeared when he was four. And kept repeating this statement: “The World is such a bad place.” He was almost crying.

I mean, he was one of those guys who look like they begin to drink in the morning. However, he did not look drunk to me. He looked just sad. This made me realize it had been long since I last saw an emotion that had been so sincerely felt by its holder. Even considering the distance of the event. Actually, among the things he said there was something connected with the vulnerability of children: he told me that Russia was destroying everything in Ukraine and that these are very bad things. It really made me think of the authenticity of such emotions.

### **B.8. Azorean identity education**

What follows is the translation of a planning related to Grade 8 of a secondary school in Terceira Island. The document was given to me by the head of school.

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<sup>11</sup> Andrea Mattia Marcelli, ‘Emotions’ (Field journal, 11 May 2022).



### *B.8.1. Introduction*

Departments:

History and Philosophy / Social Sciences

Title:

Planning for ‘Citizenship – Azorean History, Geography, and Culture’

Grade:

Eight grade (8).

School Year:

2019/2020.

### *B.8.2. Policy documents of reference*

- *Referencial Curricular para a Educação Básica na Região Autónoma dos Açores*, issued by Regional Policy Decree No. 17/2011/A of August 2011 (short: CREB).
- *Referencial de Cidadania*, issued by the Regional Legislative Decree No. 21/2010/A of June 24, 2010.
- *Programa de História Geografia e Cultura dos Açores (HGCA)*, third cycle of primary school

### *B.8.3. General goals*

- Deepening knowledge on Azorean history, geography, and culture.
- Problematize contemporary insular reality, in a perspective that integrates the multiple disciplinary dimensions of scientific knowledge.
- Analyze issues of Azorean history, geography, and culture by taking into account the challenges of our current age.

### *B.8.4. Assessment*

Assessment is based on the guidelines of the *Referencial de Cidadania*, as established by the Regional Legislative Decree No. 21/2010/A of June 24, 2010, once contents are delivered in the ‘Non-Disciplinary Curricular Area of Citizenship,’ and always in relation to a changed attitude concerning “know to value, know to preserve, know to manage.” This way, the following parameters will be taken into account:

Observation of attitudes  
Observation of demonstrated interest  
Analysis of oral interactions

Analysis of participation in activities, within and without the classrooms, as well as projects  
Analysis of products, with particular attention to those that result from approaches in the field of ICT.

Starting with this direction and considering the relevance of *learn to know, value, and preserve* in the context of citizenship, the following areas of commitment are identified, which, for students, will be reframed as assessment criteria:

Communicate assertively  
Solve problems appropriately  
Analyze ethically both individual and collective action, as a support to the adoption of criteria for action  
Conceive of and operationalize projects  
Use ICT

#### *B.8.5. First term*

Contents:

Part 1 – History of the Azores

Topic A: Discovery, settlement, and administration of the Azores

A1 The natural outlook of Azores before their settlement

A2 The issue of discovery or re-discovery. Chronology and main characters

A3 The origin of the settlers and the early settlers

A4 Incentives to settle: the donations of land [*dadas de terra*]

A6 Transformation of the landscape and impact on biodiversity

Topic B: The geostrategic relevance of Azores

B1 Support to navigation in voyages of ships returning from Africa, Brazil, and the Indies. The Admiralty [*Provedoria das Armadas*]

B2 Dominion of the seas and international rivalries: Philip II

B3 The relevance [of Azores] in international politics, support to maritime and air navigation, and telecommunications today

Goals:

Localize the different scales of the Archipelago of Azores

Analyze physical features of the Archipelago of Azores

Know the chronology of discovery of the Archipelago of Azores

Know the political-administrative organization of the settlement of Azores

Characterize the different cycles of economic surveying of the Azores

Recognize changes in Azorean landscape and biodiversity

Strategies/resources:

Localize the archipelago on the World Map

Construction of a Mini-Atlas of the Azores

Visit to the City Council of Angra do Heroísmo  
 Visit to the botanic garden (with native plants)  
 Ranking the achievements linked to the (re)discovery of the Azores  
 Creation of small group works concerning the characters and circumstances of the navigators that would (re)discover and settle the Azores  
 Explore maps, written documents, and audiovisual sources concerning the understanding of the rediscovery, peopling, administrative organization, and economic outlook of the Azores  
 Explore documents and maps to understand the impact of the economic instruments adopted in that period  
 Visit to the Museum of Angra do Heroísmo (exhibition: *Do mar e da terra – Uma historia no Atlântico*)  
 Analyze various sources (written documents or pictures) related to the Restoration of the independence and of the insular reality  
 Realize works of inquiry that allow to emphasize the geostrategic importance of the Azores and their vulnerability with regards to the Portuguese Mainland, Europe, and the World  
 Realization of a debate managed by Professor [...] of the University of Azores, concerning the geostrategic importance of the Azores in the current international setting

Term duration: 24 classes.

#### *B.8.6. Second term*

Contents (Part 1):

Part 1 – History of the Azores

Topic C: The Azores in contemporary age: politics and administration

C1 The process of consolidation of Liberalism in Portugal: the role of Azores

C2 Political-administrative changes of Liberalism: the division of Azores in districts

C3 The Autonomist movements: main characters and outcomes

C4 April 25 and Constitutional Autonomy

C5 Azores and European integration

Goals (Part 1):

Recognize the central role of Azores in the establishment of Liberalism in Portugal

Understand the political-administrative changes in the Azores, as a result of the establishment of Liberalism

Identify the autonomist movements of the Azores and their main characters

Recognize the importance of April 25 for Regional Autonomy

Understand the importance of the European Union in the support of peripheral regions

Strategies/resources:

Produce timelines with the fundamental moments of the national and Azorean political evolution  
Visit to the Museum of Angra do Heroísmo (exhibition: *Do mar e da terra – Uma historia no Atlântico*)  
Visit and study of the local monuments (Pico da Memória, noble hall of the City Council of Angra do Heroísmo)  
Recreation of events occurred in the Azores, through art or theatre  
Collection of oral testimonies of families and friends  
Analyze various historical and historiographical sources about the ‘Casa da Roda’ of Terceira Island and its historical contextualization  
Edit biographies, starting with pictures, photographs, and articles of the major Azorean characters that became prominent in the regional and national politics, illustrating their contribution

#### Contents (Part II):

##### Part II – The current dynamics in the Azores

###### Topic D: Azorean Heritage

D1 Azorean cultural heritage: peculiar elements and tangible and intangible values

D2 Azorean natural heritage: know and preserve the functions of the ecosystems

###### Topic E: The sedimentation of “Açorianidade”

E1 Geography, art, culture, and other dynamics of “Açorianidade”

###### Topic F: The future of the Azores

F1 Environmental challenges of the Twenty-first Century

F2 Strategic pathways of regional development: the role of history and geography in Azorean culture

#### Goals (Part II):

Understand the concept of heritage

Distinguish cultural heritage from natural heritage

Recognize the importance of the preservation and valorization of the cultural and natural heritage

Define the concept of sustainability

Recognize means to be applied to economic sectors in ways that could guarantee sustainability

Infer tools for a sustainable development, to be used in the future, to contribute to a society with more justice and solidarity

#### Strategies/resources:

Realize pedagogical and didactic games

Create posters concerning currently extant Azorean heritage

Exhibition with posters that disseminate and create awareness concerning the preservation of the historical and cultural heritage of the Azores and of the World

Realization of interviews to understand the techniques of Azorean agriculture, in a comparative perspective with those used in the Nineteenth Century

Write research reports on places that belong to World Heritage: Historical Centre of Angra do Heroísmo and *vinha do Pico*  
Organize conferences on environmental awareness-raising  
Write research reports on the impact of economic policies on nature and the landscape  
Produce a thematic dossier on the impact of farming on religious and cultural manifestations

Term duration: 24 classes.

## **B.9. Bullfighting**

I was in doubt whether I should have collected data about bullfighting as well, since, *prima facie*, this activity appears to be way different from the Carnival and could have heavily shifted my investigative focus. However, given the uniqueness of the opportunity, I welcomed my host's invitation. As it turned out, it was an excellent opportunity to delve into the lifestyle of some circles [*cliques*] of islanders.

### *B.9.1. A changing society*

The history of Bullfighting in Terceira is intertwined with the history of its society. Methodologically speaking, data gathered so far relate to the way bullfighting is perceived by some of its oldest-living practitioners (e.g.: my host and his brother); this means data, so far, are not yet triangulated with other sources, although I will try to supplement them with insights from my previous 2020 visit to the island.

According to retired bullfighters, bullfighting has always existed in Portugal, but took a different twist at the end of the 19<sup>th</sup> Century. Originally, fighting bulls were slaughtered by a *Fidalgo* [nobleman], who rode into the arena with his horse<sup>12</sup> to fiercely slaughter the bull with his sword. Until then, peasant *Forcados* were acting just as assistant and would rush to the rescue of the aristocrat (or the seasoned *Tourador* acting as such) to shield his body with

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<sup>12</sup> Supposedly, an old horse with health issues, given everyone assumed it would be disemboweled by the end of the gruesome show.

their owns and keep the bull at bay thanks to a series of forked spears (hence, the name “*Forcados*”—the “Forkers”). However, as the sport changed its face, the role of *Forcados* became increasingly prominent, to the point one would see no more *Fidalgos* in the arena, but just *Forcados* playing with the bull.

At this stage, it is not yet clear what is the source of my host’s mythopoesis. In fact, when the two old men recall dynamics as such, they appear to be repeating a teaching that has become doctrine in their minds. This means that either this story constitutes a crystallized form of folk social theory—i.e.: a social theory produced by non-professionals—or my informants participated conferences where historians or other type of researchers explained their theories. The latter might be the case, since the *Tertúlia* boasts a number of international meetings concerning bullfighting in the world—and is a powerful enough association to have been a host to some of such gatherings. Anyway, the social theory herein exposed, however crystallized it might be, is not necessarily false and constitutes an intriguing insight into the transformation of bullfights from (urban?) ritual to sport, together with the massification of society and the disappearance of the ruling nobility (or its loss of interest for displays of blood).

### *B.9.2. Bullfighting: not always in a good shape*

By inquiring about their own memories, it emerged bullfighting had not always been in a good shape, especially on Terceira Island. This should not surprise the reader, because my fellow Portuguese informants had their youth in the 1950s and 1960s, that is, at the post-war peak of Salazar’s regime [*Estado Novo*]. A key element of the *Estado Novo* policies was its anti-folklore “progressivist” attitude, which despised the old *fado* songs, bullfight, and other folkloric elements, which it aimed to purge and substitute with practices of its own making (see Colvin, 2010).

Possibly because of such repressive policies, and because of the relative poverty of islanders, post-war bullfighting had become a show to entertain the audience of local fairs and the populace during festivals. The informants insisted I took notice of their earliest black-and-white pictures, which showed ill-assorted crews, whose *Fidalgo* stood out because of his tie and better-looking jacket. And yet there was no specific training involved—they tell me—just the passion driving the fans of the sport. But who was the *Fidalgo*, anyway? I had been told of a role that was already disappearing in the late 19<sup>th</sup> Century, and yet here is one of them, staring at the camera in the 1950s. My host explains that the man in the picture, which he does not name, used to perform for a fee, as it was customary in those decades. Whoever wanted to organize a bullfight just had to get in touch with him and, of course, with a *Ganadero* ready to offer his bull for the show; often, given it was a great prestige to put a bull in the arena, *Ganaderos* themselves would organize the bullfight.

This recount first appeared to be in contrast with the seemingly “urbanite” flavour with which my informants keep coating nowadays’ bullfights, but eventually revealed the breadth of their narrative: bullfighting, originally a noblemen’s endeavour, survived throughout the 20<sup>th</sup> Century thanks to fans and *apoiadores* [supporters] who “kept it alive” notwithstanding the opposing governments and the dwindling interest of the crowds—only to emerge later, with renewed strength, after the demise of the *Estado Novo* thanks to the *Revolução dos Cravos* [Carnation Revolution] of 1974. Such storytelling acts as a cohesive factor among the current *Forcados*, and establishes a continuity that overlaps, and replaces, the actual discontinuities of uneven historical processes: here, Terceira is again understood by its own inhabitants (or a part thereof) as an incubator of culture and of the practices of a people [*Povo*] that is resilient and able to withstand the tests of time.

Analytically, current bullfights in Terceira are but a transfiguration of the mythic past. This prompted an attempt to swiftly reconstruct the stages of *Tourada Terceirense* on top and

beyond the stories told by my closest informants, and classify the different levels at which this piece of Azorean history could be told.

### *Bullfighters versus the Estado Novo*

This is one of the most implicit storylines since none of my interactions with the islanders ever mentioned Salazar and his regime. Aside from the trope of the wound too fresh to be touched on, it seems that the hidden histories of cultural practices during the *Estado Novo* period are now a major topic in the investigations of both locally- or nationally-acclaimed historians.

### *B.9.3. Forcados versus Fidalgos*

As anticipated, the story of bullfights in Terceira goes together with a quasi-socialist narrative pathos, which sees the role of the “peasant” *Forcado* emerge in sharp contrast with that of the aristocratic *Fidalgo*. Society changed and the then-squires have now become the centre of the stage.

### *B.9.4. City versus countryside*

This is one of the most articulate narrative layers found in Terceira. Much like the *Estado Novo* investigative trail, it deserves closer attention and further investigation. Brief, one of the recurring trends in my Terceiran conversations is the opposition between the rural herders of the country and the bourgeois “urbanites” of Angra do Heroísmo (and, later, Praia da Vitória). One of the most notable aspects is that this “city vs. countryside” parochialism was established *notwithstanding* the relatively small size of Angra—the island capital (see section above: *Human Geography*). Said narrative mirrors the one surrounding Carnival: accordingly, Angra is a bourgeois city, whose practices are formalized and ruled by institutions that pride themselves in being selective and catering for an audience with refined tastes, whereas the countryside is a place of “authenticity” where there is no place for guile



and artifices. This tale has also the effect of recasting Terceira's countryside as an incubator within an incubator... and holds fast even if current transports and the availability of cars are now connecting all islanders more than ever.

This clear-cut narrative elicits further reflections, which bear on the contradictions exposed by it. On the one hand, bullfighting is a rural show, whose elements are all grounded in animal farming. The *Ganadero* is almost exclusively a landowner, and his bull showcases his wealth (the ability to sacrifice a worthy animal), his ability as an animal breeder, as well as the prowess of his stock. The *Fidalgo*, though converted into a quasi-professional entertainer, plays the role of a noble scion looking for glory during his errands. The *Forcados* take the stage as the quasi-socialist successors of the chivalric feats, replacing the might of the sword and of the horse with down-to-earth teamwork—that is, the peasant class, with peasant values and a pinch of *revanchism*. The arena itself [*praça dos toros*], rather than being born in the city, is more of a rural gathering place; a public one could be seen in Serreta, the smallest *freguesia* of the island as of 2021: it is a square of grass dug in the ground, which allows the audience to crowd around it or to witness the bullfighting feats from the slopes of a nearby hill. Private arenas used to be no more than ranching grounds, usually surrounded by wooden fences or the sturdier dry-stone walls—which are found everywhere on the island. In their most recent version, private arenas are circular areas surrounded by walls of brick and concrete: some could be seen on the road that cuts through the *Serra de Santa Barbara* from North to South.

Conversely, bullfights tell a tale of shifting social identities: success is met with fame, which in turns excites broader audiences; thus, the *toureiro* climbs the social ladder as he is invited to increasingly bigger events, eventually coming to the 'city proper', which hosts a major arena where his success might reach its apex. This is true for the *Fidalgo*, of course, but the same path is now reflected in the stories of the *Forcados*—and my informers in particular.

“Coming to the city [of Angra]” is paraded as the real breakthrough and represents—for them—the shift from being shunned underdogs to acclaimed sportsmen.

Hence, the urbanization of the *tourada* tells a tale of people craving for “presence”—with all the consequences such anthropological category carries with it. “Having a place” means not just the construction of a proper “arena,” but also of the *Tertúlia*, that is, a *sociedade taurina* but also a *clube recreativo* [Recreational Club]. Nothing screams “I exist!” more than the identification with a specific location on the island—and not just a random location, but a location *within* its administrative and cultural capital.

#### *B.9.5. Tale of self-made men*

However, another hermeneutic turn reveals this legend could not be too oversimplified. In fact, we have evidence of a contemporary *praça dos toros* in Angra at least since 1870, and the real building was in fact a re-building of the arena after the disastrous earthquake of 1980. Such long-lasting “presence” leads me to believe we should part the “craving for presence” narrative of my informants from the “crisis of presence” of *touradas* in Terceira.

Accordingly, it seems undeniable *touradas* were in a poor state in Terceira during the 1950s, and the few extant *Fidalgos* had become but paid entertainers that would errand from town to town (on request, of course, because in the island their dwelling could have never been too far away). This is when the story of the two brothers begins, as well as their struggle to make *touradas* as relevant as possible.

#### *B.9.6. Borrowed categories*

To do so, they exploited all the forms and shapes offered by their surrounding context: thus, the *tourada* got framed in unprecedented ways, also because such categories did not exist *before* the *tourada* came into existence—hence, it was recast as sport, as a cultural event, as a testimony of folk practices.

- *Sports club.* A club was created, under the shape of a sports society. This action provided the *Tertúlia* with benefits and recognition, as well as a viable administrative framework (NGO status).
- *Cultural heritage.* The practice was defended thanks to its cultural value and, although new in form (or renewed), it could be safeguarded because of its ability to display ancient roots—historical heritage being a valued element of Portuguese society and politics, which also makes for easier legal frameworks that could contribute to its preservation.
- *Americanization.* Other external forms of legitimation came from the American culture, closer than ever thanks to the Air Base of Lajes: through their technological dominance, Americans exerted cultural dominance as well;<sup>13</sup> in turn, cultural dominance meant that anything that could be framed as “American-looking” (either because of its structure, statute, or appeal) would be accepted as legitimately worthy. This, paired with one of the two brothers’ acquired taste for the American lifestyle (owing for his long-lasting stay in the US), resulted in a sports club arranged like a pub and covered with posters, paraphernalia, as well as big TV screens that broadcast bullfights from all over the world. Nothing to envy, in terms of furnishing and comfort, with a continental sports bar.
- *“Museification.”* Another borrowed frame that shapes the *Tertúlia* I visited is the museum: on the one hand, all corridors exhibit posters and wallpapers a-plenty, which serve as reminders of all the past and current events organized by the association. Moreover, a small room has been arranged as a “museum proper,” but my two informants confessed that although some willing expert had prepared comprehensive labelling for each item in the inventory, the place looked more like a storage with glass cases than something a visitor could enjoy. “More room is needed,” they told me: “we are arranging for it.” The wealth of items thereby stored is so rich it would take days if not a month to review everything.
- *Supplementary services.* This aspect deals more with participants engagement than “presence.” As it happens, the *Tertúlia* offers ancillary services to its members, which range from the ability to book the venue for a birthday party to just showing up for a drink. Betting is forbidden [at some point I asked explicitly, and risked offending my informants].

#### B.9.7. *Corda vs. Praça*

The “city vs. countryside” contrasting couple is reflected by a specific divide among bullfighting practices in Terceira. In fact, while bullfighting matches play out in Angra’s arena (literally: a sandbox), another bullfighting activity takes place in Terceira, and is so widespread it enjoys its own calendar and supporters: *tourada à corda*. When such bull-game takes place, the organizing *freguesia* blocks a segment of the main road, shopkeepers shield

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<sup>13</sup> An informant told me the first time he saw a television show, it was a baseball match

their windows with wooden boards or other protective measures, and a bull is partially released in order for the most daring members of the audience to challenge it in every possible way. For example, the bull is teased with umbrellas, household objects, or just by crossing its path. To prevent unpalatable incidents, six herdsmen [*pastores*], customarily dressed in a white sailor suit, pull a long rope that is tied around the bull's neck. Setting aside, the most striking difference between *tourada à corda* and bullfights in the arena is that the former breaks the fourth wall, to the point there is no actual difference between spectators, bystanders, and participants. The collective and informal nature of *touradas à corda* was despised by my informants, who went to the point of regretting its existence. They told me it lacks professionalism, it features no real competition, and, most ominously, reduces a previously ritualized event to a freak show.

#### *B.9.8. Public versus private*

Bullfights are inherently public. However, another informant revealed to me that, on occasion, “private” bullfights are organized. The way I came to know of their existence is indirect: I was inquiring about the slaughtering of bulls. Killing the bull on the arena is strictly forbidden—I was told with hesitation—but, on occasions, “private” events are organized and... “it might happen” (see below: *life and death*).

#### *B.9.9. Life and death of the bulls*

When it was disclosed to me that it was *possible* some private *ganaderos* organized *touradas* in which the bull was killed, I was immediately tempted to frame such information through some cliché category, such as: “the dark side of Terceiran bullfights.” That would have been an appealing title. However, drawing on Beneduce (2010?) I would rather reject the usage of scandalmongering language *in lieu* of a plausible interpretation of what is going on behind the curtains. The information I gathered is still tentative and since I was forbidden to report

places and names, I did not follow this track up to its end and am currently waiting for ethical clearance in this regard.

Attempts to regulate contemporary *corridas* date back 1836–1837,<sup>14</sup> when the *golpe setembrista* (September 9<sup>th</sup>, 1836) put Passos Manoel on the prime minister seat: ten days after the coup d'état, the newly appointed PM introduced “progressivist” policies, which drew on bourgeois belief sets with the aim to renovate Portugal and “civilize” it—this being at the time a common political trend in all Europe and beyond. The edict was enforced for 9 months, and later rebuked because of ensuing protests. In 1921 the ban was ultimately lifted but reinstated in 1928 by the *Estado Novo*. Local laws implement the ban, such as *Lei n.º 92/95, de 12 de Setembro* (article 3.3) enacted by *Procuradoria-Geral Regional de Lisboa*.

Although this shows a history of regulation attempts in Lusitania, what changed was the values involved in the decision-making. For the 19<sup>th</sup> Century progressivist bourgeoisie, animal welfare was part of the issue, but the most relevant aspect was the idea blood sports had no place in a civilized country (in sharp contrast with the Napoleonic and post-Napoleonic fetishization of Ancient Roman and Ancient Greek Culture). The ruling class romanticized the Middle Ages and European history in general as a period of passion and emotions but would not allow hot-bloodedness to break into the poised safety of socialite parlours.

Conversely, late 20<sup>th</sup> Century and early 21<sup>st</sup> Century regulation attempts, which have been more successful than not, build not just on an idea of civilization *per se* but on the ethically grounded notion of animal welfare. Similarities with past movements are still present, yet the

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<sup>14</sup> I will not deal here with all the attempts to regulate *corridas* promoted by Catholic popes (16<sup>th</sup> Century onwards), which blended counter-reformist morality with open opposition towards the Hispanicization of the Italian peninsula.

rejection of blood sports additionally draws on belief sets linked to pacifism, vegetarianism, and the general rejection of war and violence on behalf of current polities.

*Estado Novo* is located in-between these two major tendencies: on the one hand, it abided by ideas of progressivism; on the other hand, however, it enforced them merely to increase the power of the ruling élite.

#### *B.9.10. Life and death of the fighters*

My visit to the museum of Terceira's *Tertúlia Tauromáquica* was also an opportunity, for the two brothers, to remember the death of one of their fellow *forcados*. Such recalling was triggered by a basic question about personal safety during the bullfights; to my defence, I did not expect it to address traumatic events because I had no notion of the degree of risk involved. My informants revealed to me that on August 4<sup>th</sup>, 1991, a 25-year-old *forcado* fell against a 500 kg *bravo* (i.e.: a bull trained to fight). Most notably, the incident was described to me as tragic and exceptional in nature.

#### *B.9.11. Past and present*

As anticipated in the previous paragraphs, current touradas constitute a post-modern case of current show that re-interprets the past and attempts at representing it, to some extent. Although bullfighting rituals partly reproduce ancient practices, the current popular show follows rules and regulations that date back, at best, to the post-war period. That is not to diminish the value of a cultural practice vis-à-vis the overall Portuguese culture, which values historical continuity above other aspects; instead, that is a way to highlight the resiliency of heritage practices, which are always capable of producing something new by reassembling components inherited from the past. For example, although my hosts would swear on the primary role of the *forcados*, Portuguese-style touradas still feature *cavaleiros* (and *cavaleiras*!) as one of the main parts of the show. Analogously, although Portuguese-style

bullfighting is paraded as a non-lethal sport, blood still flows as the bull's skin is pierced by the rider's bandarilhas; even surviving bulls are often butchered just after the show.

#### *B.9.12. Men and women*

Linked to the previous *past–present* couplet, the changing gender roles are telling of how current bullfighting is changing. Since 2000, women have been participating not just *qua* interviewers, journalists, or *ganaderas*, but also as *cavaleiras*. Yet, the entire scene remains male-dominated... so it is not clear whether *touradas* will be preserved at the expense of mono-genderism, or whether its supporters will keep it as a bastion of old-fashioned masculinity. Further inquiries are needed to establish whether the inclusion of women was originally negotiated as a political choice: by welcoming women, the sport fends off further criticism coming from the gender debate—given the scene is already pretty busy resisting the erosion caused by animal-right activists and the loss of popular interest.

#### *B.9.13. Bullfighters' education*

Eventually, the conversation with my informants steered towards the theme of the education of *toureros* and *forcados*.

The first element is constituted by the inter-generational character of societies such as the *Tertúlia Tauromáquica*: my two informants would swear bullfighting is popular among the youths (but statistical data on Portugal suggest otherwise) and, indeed, there are some young lads with us at the pub. However, it appears the voluntary nature of sports and NGO work attract those who have more time to dedicate to recreational activities—that is, elderly people.

But age is a tough mistress on *toureros*, and one of my informants explained that, after growing old, he moved from practice to teaching; eventually, he left teaching after one of the teachers he trained reached full maturity.

Training entails participation to a series of training sessions that take place all over the year. Although it is a widely accepted idea that the *touro bravo* should never fight twice, training is an altogether different experience for bovine participants. Indeed, smaller (and younger) bulls are used to train the youths, and they increase in size as the *forcados* improve their skills. As with the official *corrida*, the bull's horns are sewed and capped with leather to reduce risks for the players. Moreover, in the earliest stages of training, instead of facing a real bull, trainees face a realistic dummy—usually mounted on bicycle wheels and pushed by the older *forcados* who participate the training sessions. Presumably, before the invention of bicycles, bulls' heads were mounted on a wooden cart.



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