

# PERTEVMUN'26

## JCC Study Guide

Agenda Item:

*The Eagle And The Lion: The Portuguese Restoration War*

**Under Secretary General:**

Kerem Kılıç

**Co-Academic Assistants:**

Eren Kazan

&

İbrahim Furkan Günler

&

Alper Oduncu

## Table of Content

1. Letter from the Secretary General.....	2
2. Letter from the Head of Crisis.....	3
3. Letter from the Academic Assistants.....	4
4. Introduction to the Committee.....	5
5. Directives.....	6
Directive Types.....	6
How to Write a Proper Directive:.....	7
6. Iberian Union and the Origins of the Crisis.....	9
7. Historical Background.....	10
Rise of Independence Movements.....	10
The 1640 Coup.....	11
Declaration of Independence.....	12
8. Military System of the States.....	13
The Braganza Council: The Portuguese Royalists.....	13
The Iberian War Council: The Habsburg Monarchy.....	13
9. Spanish Attempts to Retake Portugal.....	14
10. Early Battles(1641-1645).....	15
Escalation of the Conflict.....	16
11. Economic Strain and Civilian Impact.....	18
12. The European Context.....	19
Impact of the Thirty Years' War.....	19
The Role of the Dutch Republic.....	19
International Recognition of Portuguese Independence.....	20
13. Consolidation of Portuguese Independence (1646-1668).....	21
14. The Treaty of Lisbon (1668).....	23
15. Key Figures.....	24
16. Political Situation of the States.....	25
17. Summarized Timeline of the Events.....	26
18. Character Descriptions.....	29

# 1. Letter from the Secretary General

ESTEEMED DELEGATES AND DISTINGUISHED GUESTS,

ON BEHALF OF THE WHOLE PERTEVMUN FAMILY, AS THE SECRETARY GENERAL, IT IS MY GREAT HONOR AND PLEASURE TO WELCOME YOU TO THE THIRD ANNUAL SESSION OF PERTEVMUN.

I WOULD LIKE TO EXPRESS MY APPRECIATION TO OUR AMAZING ORGANIZATION TEAM AND ASTONISHING ACADEMIC TEAM FOR THEIR HARD WORK AND GREAT EFFORT. THANKS TO EVERYONE'S DETERMINATION AND COMMITMENT, WE PREPARED YOU 12 COMMITTEES FOR YOU, WHICH INCLUDE TWO GENERAL ASSEMBLY COMMITTEES, SEVEN SPECIAL COMMITTEES, AND THREE CRISIS COMMITTEES. THE COMMON GROUND OF ALL OF THESE COMMITTEES IS TO ENCOURAGE YOU TO DEBATE OR ACT UPON EITHER HISTORICAL, CURRENT, OR FUTURISTIC ISSUES AND GLOBAL TOPICS TO BROADEN YOUR PERSPECTIVES.

I HOPE FOR THE DURATION OF PERTEVMUN'26, ALL THE PARTICIPANTS HAVE ONE OF THE MOST SPECTACULAR EXPERIENCES OF THEIR LIVES FILLED WITH TEAMWORK, NEW FRIENDSHIPS AND UNFORGETTABLE MEMORIES.

#LIVEFORTHEAPPLAUSE

SINCERELY,

ELA KARABATI

SECRETARY-GENERAL OF PERTEVMUN'26

## 2. Letter from the Head of Crisis

It is my utmost pleasure to welcome you to this committee and this year's annual session of PERTEVMUN. I am more than glad to be the Head of Crisis and the Under-Secretary General of the Joint Crisis Cabinet. Since we are in a crisis committee, we will proceed with another procedure instead of the General Assembly procedure. My crisis team and I have been working on this committee to provide you with a wide range of crisis experiences. Whether you have any questions about the guide, the committee, or the procedure, please do not hesitate to contact me via e-mail.

Your Sincerely,

Kerem Kılıç

+90 537 543 12 02

[uyekggh@gmail.com](mailto:uyekggh@gmail.com)

### **3. Letter from the Academic Assistants**

Distinguished delegates, I take great honor in welcoming you to our committee. It is my pleasure to be your academic assistant in PertevMUN'26. We have given a lot of energy and time in order to provide you with this committee and I am sure it is going to be a great conference for all of us. The agenda is pretty interesting and I hope you are happy to participate in it. If you come across anything you do not understand in the study guide, please contact me through my e-mail: [alperrdncu@gmail.com](mailto:alperrdncu@gmail.com)

With respect,  
Alper Oduncu

## 4. Introduction to the Committee

The Restoration War between Portugal and Spain began with the Portuguese revolution of 1640 and ended with the Treaty of Lisbon in 1668, bringing a formal end to the Iberian Union. The period from 1640 to 1668 was marked by periodic skirmishes between Portugal and Spain, as well as short episodes of more serious warfare, much of it occasioned by Spanish and Portuguese entanglements with non-Iberian powers. Spain was involved in the Thirty Years' War until 1648 and the Franco-Spanish War until 1659, while Portugal was involved in the Dutch–Portuguese War until 1663. In the 17th century and afterwards, this period of sporadic conflict was simply known, in Portugal and elsewhere, as the Acclamation War. The war established the House of Braganza as Portugal's new ruling dynasty, replacing the House of Habsburg, which had been united with the Portuguese crown since the 1580 succession crisis. Since this committee is a crisis committee we will proceed with another procedure. Do not worry about this new procedure as the USG I will give you a comprehensive directive workshop in the first session of the conference, but here is a basic explanation about the procedure. Firstly, you are not representing a country but representing a character from the date that we will simulate. That means you don't have to use "we" language in these kinds of committees. Crisis are the events and updates that the crisis team will give you according to your actions throughout the committee. You will receive lots of them since you will take your next movements according to these crises and updates. One of your aims in the committee will be to solve these crises by taking proper action.

You will take these actions by using your personal or the cabinet's power and write directives instead of the resolution papers, like in the GA committees. Directives are the documents you write to take immediate actions and create short-term solutions, which is the difference between directives and resolution papers. Another aspect of directives differing from resolution papers is that you write multiple directives and write them on your papers via handwriting. Now let's learn what exactly directives are and how to write them.

PS. Exact Time: December 1, 1640, after Braganza declared themselves as an independent state and Spanish diplomats sent an ambassador to Portugal in order to surrender them.

The Braganza Council: The Portuguese Royalists- The Habsburg Monarchy

## 5. Directives

### Directive Types

**Personal Directives:** In personal directives, you take actions as yourself by using your own personal powers. Since you will be using your own powers, you should consider what powers does your character have. For example, a character who is a commander can take some military actions, etc.

**Joint Directives:** Joint Directives are directives that are written by more than one person. You can separate and write the directive part by part. While writing these directives, it is crucial that you work together in coordination and reach a middle ground about your ideas.

**Information Directives:** In information directives, you ask for some data that is not written in the study guide. These types of directives should be short and clear. The Crisis Team will tell you the info you need in the next update if what you ask is necessary and clear. An information directive example:

*From: Genovevo de la O*

*HCC*

*To: Emiliano Zapata*

*14.07*

*I would like to be informed about our troop counts, military bases and the distribution of soldiers to military bases.*

**Press Releases:** In press releases, you are addressing the people in the country by using the media organs. They are crucial for controlling public opinion, so you should use them wisely. Language skills are crucial in order to write a well-structured and effective press release.

**Top Secret Directives:** In top secret directives, you also take actions by using your powers but the difference is that the directive will not be known by anyone in your cabinet. These types of directives are mostly used for assassinating someone in your cabinet or even your chair. You have to give these directives secretly to the admins for them to bring your directives to the crisis team members. Since your chair shouldn't see top secret directives, find a way to give it to the admins. You can give it via hiding it inside your empty water cup, secretly putting it in their pockets, etc.

## How to Write a Proper Directive:

- > Always write your character's name and the committee on the directive.
- > You need to write the timestamp on top of your directive that you are sending. The crisis team will evaluate your directives according to timestamps.
- > It is highly suggested to give enough details in your directives for them to be accepted and evaluated. Your directive must answer the "Five Ws and one H" questions (Who, What, Why, Where, When, and How)
- >Your directive's purpose and aim should be clear.
- >You should use accurate information. If you cannot find the information you want on the internet, you can send an info directive about it.
- > While you are writing your directives, do not forget to stay on topic, even if you write a perfectly detailed directive if it's not related to the topic or is unnecessary, the crisis team could reject your directive.
- > Your directives should be realistic. Depending on your committee's topic, the realism of your directives can change.
- > You should not write your directives like writing a story. Using "If, Else Clauses" in your directives will improve the quality of your directives.
- >You should write your directives in readable handwriting for the crisis team members to give your directives fair updates.

## WRONG WRITTEN DIRECTIVE EXAMPLE:

*FROM: Elaine Kamarck*

*TO: Related Departments*

*We are establishing a Video Editing Agency (VEA) under the Internet Agency of the Mexico, as soon as possible. The center place of the Video Editing Agency will be held in Tennessee.*

**Mistake 1:** You cannot write “Related Departments” to “TO:” part. You must specify which department you are writing this directive to.

**Mistake 2:** There is neither a timestamp nor the name of the cabinet.

**Mistake 3:** This directive is not detailed enough and does not answer the “Five Ws and One H” questions (Who, What, Why, Where, When, and How). You can see the detailed version of this directive below.

### PROPERLY WRITTEN DIRECTIVE EXAMPLE:

*FROM: Genovevo de la O*

*HCC*

*TO: Emiliano Zapata*

*16.21*

*We are establishing a Video Editing Agency (VEA) under the Internet Agency of the Mexico, as soon as possible. We will pick 100 professional video editors and pay them monthly 20.000 USD for educating partisans of the Parties who want to learn how to montage a video. If they do not accept the offer we will increase the offer to 35.000 USD, if they do not accept it again those who reject our offer will not work with us. The education will be given Saturdays and Sundays every week. We will rent 5 schools and use 20 classes for each school. We will pay monthly 10.000 usd for each class we rented. If they do not accept our offer we will offer 15.000 us for each class. If they do not accept our offer we will not work with those schools. In every class, there will be 1 professional video editor and 6 partisans of the democratic party who want to learn how to montage a video. The education will be free for partisans of the democratic party. All of the costs will be paid by the democratic party. The education will be produced until partisans of the democratic party learn how to montage a video.*

*5 high schools which we will rent if we can agree with the schools:*

- 1. Staten Island Technical High School*
- 2. Bronx High School of Science*
- 3. Townsend Harris High School*
- 4. Stuyvesant High School*
- 5. High School of American Studies at Lehman College*

*We will try to rent another Mexican school if we cannot agree on the 5 schools written above.*

## 6. Iberian Union and the Origins of the Crisis

The origins of the Portuguese Restoration War are traced to the establishment of the Iberian Union in 1580, when the Portuguese and Spanish crowns were united under the rule of the Spanish Habsburg. The crisis began after the death of Sebastian of Portugal in 1578 at the Battle of Alcácer Quibir. Sebastian died without an heir, creating a succession crisis in Portugal. His successor, Henry of Portugal, ruled only briefly and also died without a direct heir in 1580. Several claimants emerged for the Portuguese throne, but the most powerful was Philip II of Spain, who asserted a dynastic claim through his mother who was a Portuguese princess. Philip II ultimately secured the Portuguese crown through a combination of political pressure and military intervention. After defeating rival claimants, Spanish forces entered Portugal and Philip was recognized as king, establishing the Iberian Union. Although Portugal remained legally a separate kingdom with its own laws, currency, and colonial administration, the monarchy was now ruled from Madrid. In theory, the union was supposed to respect Portuguese autonomy, but over time many Portuguese elites believed that their kingdom's interests were increasingly subordinated to the broader priorities of the Spanish Empire.

This perception grew stronger during the early seventeenth century as Spain became deeply involved in multiple European conflicts. Portuguese colonies and trading networks were exposed to attacks from Spain's enemies, particularly the Dutch Republic and England. Overseas possessions that had once been relatively secure under an independent Portuguese crown now became targets within the wider geopolitical struggle against Spain. Meanwhile, economic pressures and increased taxation generated dissatisfaction among Portuguese merchants. Many people believed that Portuguese resources were being used primarily to support Spanish wars rather than protect Portugal's own interests. This growing dissatisfaction eventually laid the foundation for the rebellion of 1640 and the beginning of the Restoration War.

## 7. Historical Background

### Rise of Independence Movements

During the final decades of the By the early seventeenth century, economic strain, military obligations, and colonial losses had begun to erode confidence in Spanish rule. One of the central sources of tension was the impact of Spain's numerous wars across Europe. The Habsburg was heavily engaged in conflicts such as the Thirty Years' War and the struggle against the Dutch Republic. These wars placed enormous financial and military demands on the Spanish state, and Portugal was increasingly expected to contribute resources to support these campaigns. Portuguese merchants and administrators complained that their trade networks and colonial interests were being exposed to danger because Spain's enemies often targeted Portuguese overseas possessions. The political structure of the Iberian Union also created growing resentment among Portuguese nobles. Although Portugal formally retained its own institutions, many key decisions were effectively made within the Spanish court in Madrid. Portuguese nobles feared that their influence within the kingdom's political system was gradually diminishing. In addition, Spanish officials were sometimes appointed to administrative positions within Portugal, which further fueled concerns about the erosion of Portuguese autonomy.

By the 1630s, these grievances had encouraged the emergence of informal political networks that discussed the possibility of restoring an independent Portuguese monarchy. Members of the nobility, military officers, and influential figures within the court began meeting in secret to discuss potential strategies for challenging Spanish authority. Although these discussions initially remained cautious, they gradually evolved into more organized conspiracies aimed at removing Habsburg control. Within these circles, attention increasingly focused on the powerful House of Braganza as the most suitable dynasty to lead a restored Portuguese monarchy. The head of the family, John IV of Portugal, possessed both significant wealth and a legitimate dynastic claim to the Portuguese throne. Many conspirators believed that only a noble of such prestige could unite the country and successfully challenge Spanish rule.

Despite the growing dissatisfaction with the Iberian Union, the decision to initiate open rebellion was not taken lightly. Spain remained one of the most powerful states in Europe, and any attempt to restore Portuguese independence carried enormous risks. The independence movement therefore gradually transformed from a collection of private discussions into a coordinated political conspiracy that aimed to overthrow Habsburg authority in Portugal.

## The 1640 Coup

The conspiracy that ultimately led to the restoration of Portuguese independence reached its decisive moment on December 1, 1640. After months of planning and secret coordination, a group of Portuguese nobles and military officers launched a coup in Lisbon aimed at overthrowing the Spanish administration that governed the kingdom in the name of the Habsburg monarchy.

At the time, Portugal was administered by the regent Margaret of Savoy, Duchess of Mantua, who governed on behalf of Philip IV of Spain. Although the regent maintained formal authority, real administrative power was often exercised by Spanish officials and advisors. For many Portuguese conspirators, this arrangement symbolized the loss of genuine Portuguese sovereignty. On the morning of December 1, a group of approximately forty conspirators entered the royal palace in Lisbon. These individuals quickly seized control of the building and arrested key representatives of the Spanish administration. One of the most dramatic moments of the coup involved the confrontation with Miguel de Vasconcelos, a Portuguese secretary of state who was widely perceived as loyal to Spanish interests. The conspirators killed Vasconcelos and reportedly threw his body from a palace window, an act that symbolized the violent rejection of Spanish authority. Once the palace was secured, the conspirators proclaimed the end of Spanish rule in Portugal. Crowds quickly gathered in Lisbon as news of the uprising spread throughout the city. Many residents welcomed the coup with enthusiasm, and the rebels were able to consolidate their control over key government institutions with relatively little resistance.

Although the coup was organized by a relatively small group of nobles, its success depended heavily on the broader political climate within Portugal. Years of dissatisfaction with Spanish rule had created an environment in which many members of the Portuguese elite and urban population were prepared to support the restoration of independence. As a result, the conspirators were able to transform their initial seizure of power into a broader political revolution.

## **Declaration of Independence**

Following the successful coup in Lisbon, the conspirators moved quickly to legitimize their actions and establish a new political order within Portugal. Their primary objective was to restore the Portuguese monarchy under a native dynasty that could command the loyalty of the country's political elites and population. Shortly after the events of December 1, 1640, the conspirators proclaimed the Duke of Braganza as the new king of Portugal. He was crowned as John IV of Portugal, marking the official restoration of an independent Portuguese monarchy. The selection of John IV was not accidental. As the head of the House of Braganza, he possessed both immense wealth and a strong dynastic claim that linked him to earlier Portuguese royal families.

The restoration government also sought to strengthen its legitimacy by appealing to historical and legal traditions. Supporters of independence argued that the Iberian Union had been a temporary political arrangement rather than a permanent union of the two kingdoms. According to this interpretation, the Portuguese nation had the right to restore its own monarchy once the union ceased to serve the interests of the kingdom.

Despite these efforts, the new government faced enormous challenges. Spain still claimed sovereignty over Portugal, and it was widely expected that the Spanish monarchy would attempt to restore its authority by force. Consequently, the declaration of independence marked not the end of the political crisis Spanish.

## 8. Military System of the States

### The Braganza Council: The Portuguese Royalists

In the Restoration War, alongside a few main armies, the Portuguese neither had the resources to operate a fully organised army nor the men to fight in it. So they chose to rebel against castles, do defensive battles, raid the Spanish border, burn villages, close supply lines, engage in guerilla warfare and avoid fighting the “scary” Tercios.

The main armies had access to artillery, firearms, steel, horse-drawn war chariots and mounted troops with firearms but not quite as much as the Spanish. However, their cleverly deployed units did exceed the number of their enemies from time to time. The aim of the Portuguese Generals was not to grant conquest to Madrid, but to make the cost of Lisbon so heavy, the king of Spain would find it unnecessary. The Portuguese victory also depended heavily on their brilliantly used war strategies and territorial advantages.

### The Iberian War Council: The Habsburg Monarchy

There were only a few major army conflicts during The Portuguese Restoration War but the Spanish army mainly used the Tercio formation. It consisted of men using spears who usually made around %70 of the formation and arquebuses who made around %30 (These numbers are not strict and can be changed.). The combination of firearms and long-ranged weapons allowed the Spanish to engage in versatile combat. A single Tercio would have around 250 men. A Tercio would have a main infantry force equipped with spears (In the late 1500s there were some men with swords but they were removed afterwards for their inefficiency.) that would be shaped like a square and 4 little firearm units roaming independently around the main force which allowed them to shoot incoming enemies without endangering their comrades. There were multiple Tercios in the Spanish army and they would be placed in a formation that resembled a checker board to give the army better movement ability and protect the army integrity in case of a failure of a Tercio unit. Alongside Tercios, the Spanish had artillery, firearms, mounted troops (some used lances, some used fire-arms), horse-drawn war chariots and steel in their armies.

(Tercio formation on the left. Each rectangle on the right demonstrates a single Tercio in the Spanish army.)

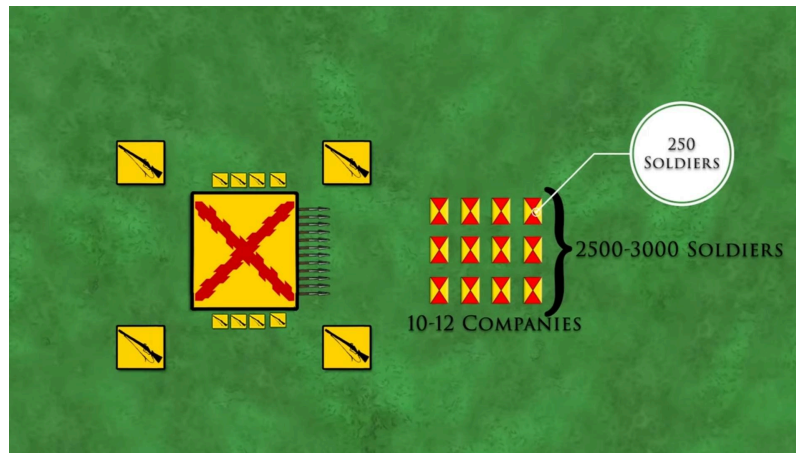
## **9. Spanish Attempts to Retake Portugal**

## 10. Early Battles(1641-1645)

In 1641, both sides began mobilizing forces and strengthening their positions in key frontier regions. Portugal prioritized the defense of strategic border towns in Alentejo, Beira, and the northern provinces, which were considered the most likely entry points for Spanish invasions. Fortresses such as Elvas, Campo Maior, and Valença became crucial defensive positions. Portuguese authorities reinforced these towns with additional troops and artillery while mobilizing local militias to assist the regular army. The government recognized that its limited military resources required a defensive strategy focused on holding fortified positions rather than attempting offensive operations deep into Spanish territory.

Spanish commanders initially attempted to exploit what they believed to be Portuguese weakness following the sudden

rebellion. Troops were gathered in neighboring Spanish provinces such as Extremadura and Galicia, from where they could launch incursions into Portuguese territory. Early Spanish operations focused on probing attacks designed to test Portuguese defenses and identify potential weak points along the frontier. These raids often targeted small towns and rural areas, aiming to disrupt Portuguese supply networks and undermine the authority of the newly established monarchy.



One of the most notable early confrontations occurred during the Battle of Montijo in 1644. In this engagement, Portuguese forces led by the Matos family commander Matias de Albuquerque crossed into Spanish territory and confronted a Spanish army near Montijo in Extremadura. Although the battle itself produced mixed tactical outcomes and both sides claimed victory, it demonstrated that Portuguese forces were capable of conducting organized military operations against Spain. The battle also had symbolic importance, as it strengthened Portuguese morale and reinforced the perception that the new Braganza regime could successfully resist Spanish attempts at reconquest.

In addition to conventional battles, both sides engaged in a pattern of frontier warfare characterized by sieges and counter-sieges. Fortified towns were of immense strategic importance because control of these positions allowed armies to secure supply routes and defend access to key regions. Spanish forces occasionally attempted to capture Portuguese fortifications, while Portuguese troops conducted defensive operations to prevent such advances. These engagements rarely resulted in decisive breakthroughs, but they contributed to the gradual militarization of the frontier.

Portugal also faced significant challenges. The Portuguese army had to be reorganized after decades of integration within the Spanish military system during the Iberian Union. The government of John IV therefore undertook reforms aimed at strengthening military institutions. New regiments were formed, fortifications were repaired or expanded, and experienced foreign officers were recruited to assist with training and organization. These measures gradually improved the effectiveness of Portuguese forces, allowing them to resist Spanish incursions more effectively.

By 1645, the early stage of the war had established a pattern that would continue throughout much of the conflict. Rather than a swift Spanish reconquest or a decisive Portuguese victory, the war evolved into a prolonged struggle characterized by border warfare and gradual military adaptation on both sides. Portugal's ability to defend its frontier towns and maintain organized resistance during these early battles proved crucial for the long-term survival of the restored monarchy.

## **Escalation of the Conflict**

As both sides began to recognize that the struggle would likely be prolonged, and their strategies adapted accordingly. The conflict therefore escalated not only in terms of military activity but also in its political, economic, and diplomatic dimensions.

For Portugal, escalation meant transforming a defensive rebellion into a stable war effort capable of resisting a powerful imperial neighbor. The government of John IV of Portugal expanded the country's military infrastructure and strengthened the system of frontier defenses. Fortifications were modernized in accordance with contemporary European military engineering principles, particularly in key border regions such as Alentejo. Towns like Elvas and Almeida were heavily fortified, becoming central pillars of Portugal's defensive strategy. The Portuguese crown also sought to improve coordination between regular army units and local militias. Militia forces composed of civilians played an important role in defending rural areas and supporting garrison troops stationed in fortified towns. Although these militias were less disciplined than professional soldiers, their knowledge of the terrain and ability to mobilize quickly provided valuable support during Spanish incursions.

Spain, meanwhile, gradually increased its commitment to the Portuguese theater. Although the Spanish monarchy initially expected the rebellion to collapse quickly, the persistence of Portuguese resistance forced Madrid to take the conflict more seriously. Spanish military leaders began organizing larger campaigns designed to pressure Portuguese defenses and potentially reopen the path toward Lisbon. Armies operating from Extremadura and Galicia were tasked with launching coordinated operations aimed at weakening Portuguese control of the frontier. However, Spain continued to face significant constraints. The Spanish Empire was simultaneously engaged in several major European conflicts that consumed vast resources. In particular, ongoing wars with France and the broader geopolitical consequences of the Thirty Years' War placed enormous strain on Spanish finances and military logistics. This strategic overextension limited the scale of operations that Spain could conduct against Portugal and often prevented Spanish forces from sustaining long campaigns on Portuguese soil.

At the same time, colonial and maritime dimensions of the conflict continued to develop. Overseas territories became economically and strategically important in sustaining the Portuguese war effort. Revenues from Brazil and other colonies helped finance the defense of the kingdom, while control of Atlantic trade routes remained vital for maintaining economic stability. Although these colonial struggles were not always directly connected to the fighting on the Iberian Peninsula, they formed part of the broader international environment in which the war was fought.

By the mid 1640s, the Portuguese Restoration War had clearly transformed into a long term military confrontation rather than a short-lived uprising. The escalation of the conflict strengthened Portuguese state institutions, encouraged diplomatic engagement with other European powers, and forced Spain to confront the limits of its imperial resources.

## 11. Economic Strain and Civilian Impact

The prolonged conflict of the Portuguese Restoration War placed considerable economic pressure on both the Portuguese kingdom and the civilian population. Maintaining a standing army, reinforcing border fortifications, and financing defensive campaigns required significant financial resources. For Portugal, a state with a smaller population and more limited fiscal capacity than Spain, sustaining the war effort demanded substantial economic adjustments. The crown was forced to increase taxation and redirect revenues from various sources in order to fund military expenditures.

One of the primary strategies used by the Portuguese government involved strengthening fiscal administration and increasing the efficiency of tax collection. New levies were imposed on landowners, merchants, and colonial trade in order to support the army and the defense of frontier regions. Revenues from overseas territories, particularly from the colony of Brazil, became increasingly important in sustaining the war effort. Sugar production and transatlantic trade helped supply funds to the Portuguese treasury, although fluctuations in trade and disruptions caused by naval conflict occasionally reduced these revenues. The economic burden of the war was also felt strongly by the civilian population. Rural communities in frontier regions were particularly affected, as repeated military campaigns led to the destruction of farmland, livestock losses, and the displacement of local inhabitants. Border towns were frequently exposed to raids and skirmishes between Portuguese and Spanish forces, creating an atmosphere of instability and insecurity for residents. Many civilians were forced to contribute directly to the war effort through militia service, provisioning of troops, or emergency taxation.

Despite these hardships, the Portuguese population generally continued to support the restoration of independence and the rule of the Braganza monarchy. Local resistance and cooperation between civilian communities and the military helped sustain defensive operations throughout the conflict. While the economic strain remained significant, the ability of the Portuguese state to maintain fiscal stability and mobilize civilian support ultimately contributed to the survival of the kingdom during the later stages of the war.

## 12. The European Context

### Impact of the Thirty Years' War

The Thirty Years' War (1618–1648) significantly influenced the course of the Portuguese Restoration War by limiting Spain's ability to focus its full military strength on Portugal. Throughout the first half of the seventeenth century, the Spanish Habsburg monarchy was deeply involved in large-scale military campaigns across Central Europe. Spain supported its Habsburg relatives in the Holy Roman Empire and fought against multiple coalitions including Protestant states, France, and various German principalities. These commitments required substantial financial resources, troops, and logistical support.

As a result, Spain faced severe military overstretch. Large portions of the Spanish army were deployed in Central Europe and the Spanish Netherlands, leaving fewer forces available to conduct a decisive campaign against Portugal after the 1640 rebellion. Additionally, the war placed enormous strain on Spanish finances, weakening the crown's capacity to fund prolonged military operations. This situation allowed Portugal valuable time to organize its defenses and consolidate the Braganza monarchy. Consequently, the wider European conflict indirectly contributed to Portugal's ability to sustain its independence struggle.

### The Role of the Dutch Republic

The Dutch Republic played an important role in shaping the broader geopolitical environment surrounding the Portuguese struggle for independence. During the early seventeenth century, the Dutch were engaged in the Eighty Years' War against Spain, seeking independence from Spanish rule. This conflict brought Dutch and Spanish forces into direct competition across both Europe and overseas colonial territories. Dutch naval power challenged Iberian dominance in global trade routes, particularly in the Atlantic and Indian Oceans. Dutch expeditions targeted Portuguese and Spanish colonial possessions, capturing strategic ports and disrupting long-established commercial networks. Although the Dutch also attacked Portuguese colonies during this period, their conflict with Spain indirectly weakened the Spanish empire. By forcing Spain to defend multiple fronts—both in Europe and overseas—the Dutch contributed to the fragmentation of Spanish military resources. This strategic pressure reduced Spain's capacity to concentrate its full power against Portugal. In this sense, the Dutch struggle against Spanish rule formed part of the wider international context that helped make Portuguese independence more sustainable.

## **International Recognition of Portuguese Independence**

Securing international recognition was a crucial step in ensuring the long-term survival of Portugal after the restoration of independence in 1640. In the early years of the Portuguese Restoration War, many European powers remained cautious about openly supporting Portugal, as Spain continued to claim sovereignty over the kingdom. Diplomatic recognition therefore became an important objective for the Braganza monarchy. Portugal gradually strengthened its international position through strategic alliances and diplomatic engagement. One of the most important developments was the alliance with England, formalized through the marriage of Catherine of Braganza to Charles II of England in 1662. This alliance provided Portugal with military assistance and diplomatic legitimacy within the European balance of power. As Spain's ability to reconquer Portugal diminished, international acceptance of Portuguese independence became increasingly likely. The process was ultimately formalized in 1668 with the signing of the Treaty of Lisbon (1668), in which Spain officially recognized Portugal as an independent kingdom and acknowledged the rule of the Braganza dynasty.

## **13. Consolidation of Portuguese Independence (1646-1668)**

By the mid of 1640s, the conflict evolved from an initial rebellion into a prolonged war for survival. One of the most important factors in this consolidation was the strengthening of the new monarchy under John IV of Portugal. After his accession to the throne in 1640, John IV worked to stabilize the internal political structure of the kingdom. The early years of the restoration had been marked by uncertainty, as the Braganza dynasty needed to secure the loyalty of the nobility, clergy, and military commanders. By the mid 1640s, however, the monarchy had successfully suppressed pro-Spanish conspiracies and reinforced its legitimacy among Portugal's ruling elites. The Braganza court reorganized administrative institutions and strengthened royal authority, ensuring that the government could mobilize resources effectively for the ongoing war.

The military organization also played a critical role in maintaining Portuguese independence. Portugal's leadership recognized that a direct offensive against Spain was unrealistic given the imbalance of power between the two states. Instead, the Portuguese strategy focused on defensive warfare and the protection of key frontier regions. Fortifications along the border with Spain were reinforced, particularly in strategic areas such as Alentejo and the northern frontier. Garrisons were established or expanded in important towns, and local militias were mobilized to support the regular army. These defensive preparations allowed Portugal to resist repeated Spanish incursions while preserving its limited military resources.

Despite Portugal's defensive strategy, the war remained active throughout the late 1640s and 1650s. Spanish forces launched multiple campaigns aimed at weakening Portuguese control of the border regions. However, these offensives often faced logistical difficulties and strong resistance from Portuguese defenders. The conflict therefore developed into a series of localized battles, sieges, and skirmishes rather than large-scale campaigns capable of decisively ending the war. Over time, Portugal's ability to maintain stable defensive lines contributed to the gradual normalization of the new political order within the kingdom. Prolonged warfare required significant financial resources, and the Portuguese government struggled to sustain the cost of military mobilization while maintaining its colonial administration overseas. Trade disruptions and colonial conflicts further complicated the situation. However, the Portuguese leadership implemented new fiscal measures to support the war effort. Taxes were increased, and the crown sought to ensure that revenues from overseas territories particularly Brazil continued to flow into the royal treasury. Although these policies placed strain on the population, they were essential for sustaining the military and administrative institutions necessary to defend independence.

Portugal also benefited from developing diplomatic alliances that strengthened its international position. One of the most significant developments occurred with the alliance between Portugal and England. In 1662, the marriage of Catherine of Braganza, daughter of John IV, to Charles II of England created a powerful political partnership. The alliance provided Portugal with valuable diplomatic recognition and access to military support. English assistance included naval cooperation and the deployment of experienced officers who helped modernize aspects of the Portuguese military structure. This partnership further discouraged Spain from attempting a decisive campaign against Portugal, as such an invasion risked provoking broader European intervention.

Meanwhile, the leadership of Portugal passed to the next generation of the Braganza dynasty. After the death of John IV in 1656, the Portuguese throne passed to his son, Afonso VI of Portugal. During the early years of his reign, political authority was largely exercised by regents and influential ministers who continued the policies of strengthening the state and sustaining the war effort. Although internal political struggles occasionally emerged within the Portuguese court, these tensions did not significantly undermine the broader goal of maintaining independence from Spain.

The later stages of the war saw several decisive military engagements that further weakened Spanish hopes of restoring control over Portugal. Portuguese forces achieved important victories in major battles, including the Battle of Elvas (1659), the Battle of Ameixial (1663), and the Battle of Montes Claros (1665). These victories demonstrated the effectiveness of Portugal's defensive military strategy and significantly damaged Spanish morale and military capability along the frontier. In particular, the victory at Montes Claros in 1665 proved to be a major turning point, as it effectively ended Spain's ability to mount large-scale invasions of Portuguese territory.

By the mid-1660s, it had become increasingly clear that Spain would struggle to reverse the outcome of the conflict. Continued warfare offered diminishing returns for the Spanish monarchy, which faced growing financial difficulties and political challenges elsewhere in Europe. At the same time, Portugal had succeeded in establishing a functioning state capable of sustaining its independence. The Braganza monarchy had secured internal legitimacy, strengthened its military defenses, and built international alliances that reinforced its diplomatic position.

## 14. The Treaty of Lisbon (1668)

The conflict formally ended with the signing of the Treaty of Lisbon (1668). Portugal had succeeded in defending its independence through a series of defensive victories, while Spain's prolonged military commitments elsewhere in Europe had limited its ability to fully reconquer the Portuguese kingdom. Portugal had strengthened its international position through alliances, most notably with England following the marriage of Catherine of Braganza to Charles II of England in 1662. This alliance provided Portugal with diplomatic backing and military support, further discouraging Spain from continuing large scale offensives. Negotiations ultimately culminated in the Treaty of Lisbon in February 1668. Under the terms of the treaty, Charles II of Spain formally recognized the sovereignty of Portugal and acknowledged the legitimacy of the Braganza dynasty, which had ruled the country since the restoration of independence. This recognition effectively ended Spanish claims to the Portuguese throne and confirmed the separation of the two kingdoms. The treaty marked the definitive conclusion of the Portuguese Restoration War. Portugal emerged as an independent kingdom once again, while Spain accepted the loss of its western neighbor in order to redirect its attention to other political and military challenges within Europe. The agreement also stabilized the Iberian Peninsula and allowed Portugal to focus on rebuilding its economy and reinforcing control over its overseas empire.

## 15. Key Figures

### **King Philip IV of Spain**

Also called the “Planet King”, he was the King of Spain from 1621 to 1665 and King of Portugal from 1621 to 1640. He is famously known for his rule over Spain in the timespan of the Thirty Years’ War. When he completed his journey on this word and his time was over, the Spanish Empire was spanning across approximately 12.2 million square kilometres in area, the largest empire in the world, occupying areas in Northern and Southern Americas, Africa, Europe and Southern Asia. Despite his success in expanding his empire’s territories, he failed to improve Spain's other objectives such as domestic and military reform.

### **Gaspar de Guzmán**

Was a Spanish royal favourite of Philip IV and the minister. He was appointed as Grandee on 10 April 1621, a day after the ending of the Twelve Years’ Truce, and was a key figure that shaped state policy in Spain until January 1643. During his rule, he over-exerted Spain in foreign affairs and unsuccessfully attempted domestic reform. His policy of committing Spain to recapture Holland led to a renewal of the Eighty Years' War while Spain was also embroiled in the Thirty Years' War (1618–1648). In addition, his attempts to centralise power and increase wartime taxation led to revolts in Catalonia and in Portugal, which brought about his downfall.

### **João IV**

He was made King of Portugal by the noblemen of Portugal on December 1st, 1640. His accession led to the Portuguese Restoration War. He signed alliances with France and Sweden but the main effect of these alliances was in the 30 Years war against Spain.

### **Luisa de Guzmán**

Despite her Spanish roots, Luisa guided her husband’s policies during the restoration war. She is considered the main influence behind the acceptance of the Portuguese throne. It is said that being warned of the dangers of becoming queen of a country that was to face Spain’s might, she pronounced the famous words: Rather Queen for a day than Dutchess all my life. When she was made aware of a failed attempt to murder the King in 1641, she is said to have been one of the members of the *Corte* which supported the execution of nobles like the Duke of Caminha.

## 16. Political Situation of the States

The Braganza Council: The Portuguese Royalists. In 1580, the Portuguese king died without an heir. This led to an unstable situation in the kingdom. Seizing the opportunity, the Habsburgs invaded the nation and took control of the country claiming that King Philip II had the right to rule since he had an ancestral connection with the Portuguese monarchy. King Philip promised the Portuguese would be treated fairly and equally with the Spanish when he claimed the throne yet in the following years, the truth would be far from the promised future. Over the years, Portuguese noblemen and merchants decided it was time for rebellion and rebelled against local rule in 1640. Because of the unfair governance in the region, the locals sided with the rebels against the Spanish monarchy as they saw victories coming from the fronts.

The Spanish folk, tired and torn out from multiple conflicts spanning through 1578 to present, had a hard time surviving and fulfilling the requirements of their king. Spain also had difficulties at sustaining an army for so many years. Western Europe was full of conflict in the 17th century. Spain was struggling with wars against Britain and France while also prioritising geographical exploration and expanding into the American continents.

## 17. Summarized Timeline of the Events

**1580-** *Death of Cardinal Henry, the king of Portugal, which led to a major succession crisis in Portugal.*

**1618-** *Beginning of the 30 Year's War*

**1621-** *Death of Philip II (III of Spain) and the succession of Philip III (IV of Spain)*

**1640-** *A small group of conspirators stormed the royal palace in Lisbon and deposed the Vicereine of Portugal, Margaret of Savoy on 1 December 1640. The Duke of Bragança, head of the senior family among the Portuguese nobility, accepted the throne as John IV of Portugal later the same day.*

**1641-** *A counter- revolution mounted by the inquisition failed.*

**1641-** *Portugal signed alliances with France (1 June 1641) and Sweden (August 1641).*

**1641-** *The Dutch began their occupation of São Tomé and of Ano Bom on 16 October 1641, where they remained until 6 January 1649.*

**1642-** *The Dutch took over all of the Portuguese Gold Coast (now Ghana).*

**1643-** *At the Battle of Rocroi (19 May 1643), in the Ardennes, the French defeated the Spanish*

**1644-** *The Battle of Montijo near Badajoz, between the Portuguese and the Spanish, was fought on 26 May 1644.*

**1644-** *The Portuguese city of Elvas withstood a nine-day siege by Spanish troops.*

**1648-** *Portuguese troops from the colony of Brazil under Salvador Correia de Sá landed in Angola, retook Luanda, and expelled the Dutch, thereby restoring the African colony to Portugal.*

**1648-** *The Treaty of Westphalia was signed. Habsburg supremacy was shortened. The Spanish Empire recognised The Dutch Republic.*

**1649-** *The Dutch were ousted from São Tomé.*

**1654-** *The Anglo-Portuguese treaty between John IV and Oliver Cromwell was signed at Westminster.*

**1654-** *Portuguese troops from the colony of Brazil drove the Dutch out of the great plantation colonies of northeastern Brazil, re-establishing the territorial integrity of Portugal's South American holdings.*

**1654-** *Spain recognised the independence of northern Netherlands.*

**1656-** *Portugal lost control of Colombo in Portuguese Ceylon to the Dutch.*

**1656-** *John IV died on 6 November 1656 after a reign of 15 years. His queen, who was born Luisa de Guzman (1613–1666), the eldest daughter of the Spanish grandee, the Duke of Medina-Sidonia, then reigned as regent for their son, Afonso VI of Portugal. She began seeking an accommodation with Spain.*

**1658-** *The Dutch took Jaffnapatam, Portugal's last colony in Ceylon.*

**1659-** *The Battle of the Lines of Elvas was fought on 14 January 1659. Portuguese troops, under the command of the marquis of Marialva, António Luís de Meneses, and Sancho Manoel de Vilhena, scored a resounding victory over the Spanish.*

**1659-** *The Spanish besieged the Portuguese town of Monção. The town fell on 7 February.*

**1659-** *The Treaty of the Pyrenees was signed on 7 November 1659, ending Spain's long war with France, and Spanish troops were free once more to suppress the Portuguese 'rebellion'. The Spaniards besieged Elvas, and they were driven off by António Luís de Meneses once again.*

**1660-** *Upon the restoration of Charles II in England, the Queen-Regent re-negotiated the treaty of 1654. Portugal was allowed to recruit soldiers and horses in England for the fight against Spain, to seek the conscription of 4,000 mercenaries in Scotland and Ireland, and to charter 24 English ships to carry them. The expeditionary force was issued English weapons upon arrival in Portugal and guaranteed freedom of worship.*

**1660-** *The English began to dominate the trade in port wine from Portugal after a political spat with the French denied them Bordeaux wines. Brandy was added to the Portuguese wines to fortify them for the Atlantic voyage. Together with the restoration of Charles II in England, the "port connection" had an increasingly positive influence on Anglo-Portuguese relations.*

**1661-** *English mediation induced the Netherlands to acknowledge, on 6 August 1661, Portuguese rule in Brazil, in return for uncontested control of Ceylon and eight million guilders. This agreement was formalized in the Treaty of The Hague (1661).*

**1663-** *The Battle of Ameixial was fought on 8 June 1663. After they had spent nearly all spring overrunning the south of Portugal, the Spanish army, under John of Austria the Younger, took the Portuguese city of Évora. Less than three weeks later, they were soundly defeated by Sancho Manoel de Vilhena and Count of Mértola.*

**1663-** *The Dutch ousted the Portuguese from the Malabar coast, even though this was a clear violation of their 1661 treaty.*

**1663-** *The Siege of Évora occurred when the Portuguese army led by Sancho Manoel de Vilhena and by the Count of Mértola retook the city from the Spanish occupiers, with little to no casualties. The entire Spanish garrison surrendered.*

**1664-** *The Battle of Castelo Rodrigo was fought on 7 July 1664. A regional military commander, Pedro Jacques de Magalhães, defeated the Duke of Osuna.*

**1664-** *The Siege of Valencia de Alcántara results in the successful conquest of the Spanish town of Valencia de Alcántara by Portugal in July 1664.*

**1665-** *Portugal was again victorious at the Battle of Montes Claros (on 17 June 1665), in which António Luís de Meneses and Schomberg defeated the Spanish army under the Marquis of Caracena; Spain ceased hostilities, but a true peace treaty was not signed for another three years. Montes Claros is considered one of the most important battles in Portuguese history.*

**1665-** *Philip IV died. By this time in history, The Spanish Empire had reached approximately 12.2 million square kilometers (4.7 million square miles) in area.*

**1667-** *King Afonso VI, Castelo Melhor, and his francophile party were overthrown by the king's younger brother, Pedro, Duke of Beja, (who later ruled as Pedro II of Portugal.) Pedro first installed himself as his brother's regent and then arranged Afonso's exile to the island of Terceira in the Azores on the pretense that he was incapable of governing. Castelo Melhor fled into exile; ironically, he chose to live in England.*

**1668-** *The Treaty of Lisbon with Spain ended 28 years of war. The regent of Spain, Mariana of Austria, acting in the name of her young son Charles II of Spain, finally recognized the legitimacy of the Portuguese monarch.*

## 18. Character Descriptions

### **Baltasar Carlos**

The heir to the Spanish monarchy.

### **Luis de Haro**

Spanish politician and general.

### **Juan José de Austria**

A Spanish general and a political figure. He fought against the Portuguese in Extremadura.

### **Alfonso Pérez de Guzmán**

A Spanish nobleman and hero of Spain during the medieval period

### **Íñigo Vélez de Guevara**

A Spanish politician. He played an important role in the war.

### **Antonio de Oquendo**

A Spanish navy officer commanding the Spanish fleet.

### **Fernando de Borja y Aragón**

A diplomat and an aristocrat from Spain.

### **Teodósio II, Duke of Braganza**

Portuguese nobleman and father of Joao IV of Portugal.

### **António Luís de Meneses**

A member of the Forty Conspirators and a general in the Portuguese army. He fought and won the Battle of the Lines of Elvas and the Battle of Montes Claros.

### **Sancho Manuel de Vilhena**

Was appointed general in the Portuguese army and participated in the defence of Beira. His greatest victories were the Battle of the Lines of Elvas and the Battle of Ameixial

### **Matias de Albuquerque**

A Portuguese colonial administrator and soldier. He was a general in Portugal where he won the Battle of Montijo over the Spaniards in 1444

### **Salvador Correia de Sá e Benevides**

Was the general of the fleets of Portugal and fought against the Dutch.

### **António Vieira**

Portuguese missionary, diplomat, philosopher and a writer.

### **Duarte Ribeiro de Macedo**

A Portuguese diplomat, economist and a writer.