

Islands, Power and Conflict: A Classical Geopolitical Reading of the Azorean Civil War (1821–1831)

Ilhas, Poder e Conflito: Uma Leitura Geopolítica Clássica da Guerra Civil Açoriana (1821–1831)

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Abstract

This article examines the Azorean Civil War of 1821–1831 from a geopolitical perspective, situating the analysis within the archipelago's condition as an outermost atlantic region, the spatial dispersion of its islands, and the limited scale of their resources, combined with the historical processes of colonization, as structural factors shaping the islands and their elites as autonomous political units. Simultaneously, these factors influenced patterns of cooperation and rivalry among the islands. Drawing on checkerboard theory, the study demonstrates that the absence of regional centrality, further intensified by the establishment of the *Capitania-Geral* and by external political contexts, created the conditions for the outbreak of a regional civil war, during which political actors continuously adjusted positions and alliances to balance local power structures. This research contributes to literature by incorporating classical geopolitical concepts into the study of intra-regional island conflicts, providing a more systematic understanding of the interplay between territory and politics in ultra-peripheral settings, and lays the groundwork for future comparative research in analogous contexts

Keywords: Azores, civil war, geopolitics, checkerboards, insularity.

Resumo

O presente estudo analisa a Guerra Civil Açoriana de 1821 a 1831 a partir de uma perspetiva geopolítica, partindo da condição de ultraperiferia, da dispersão das ilhas e da dimensão limitada dos seus recursos, aliada à história da colonização, como fatores estruturais para a configuração das ilhas e das suas elites como unidades políticas autónomas, ao mesmo tempo que molda relações de cooperação e rivalidade entre elas. Adotando a teoria dos

checkerboards, evidencia-se que a ausência de centralidade regional, exacerbada pela criação da *Capitania-Geral* e por contextos externos, potenciou as condições para o eclodir de uma guerra civil regional, na qual os atores políticos ajustaram posições e alianças para equilibrar os seus poderes locais. Este estudo contribui para a literatura ao integrar conceitos geopolíticos clássicos na análise de conflitos intra-regionais insulares, oferecendo uma compreensão mais estruturada das dinâmicas de poder e das interações entre território e política em contextos de ultraperiferia, e sugere futuras investigações comparativas em contextos similares.

Palavras-chave: Açores, guerra civil, geopolítica, checkerboards, insularidade.

1. Introduction

The outermost location of the Azores archipelago in the North Atlantic, relative to the major continental landmasses, combined with the small size and spatial dispersion of its islands, constitutes a set of natural conditions that shape the social dynamics of its inhabitants. The manner in which this geography influences the behavior of intra-regional political entities constitutes the central theme of this work, addressed through a case study: the Azorean Civil War at the beginning of the 19th century, approached using the geopolitical theory known as Checkerboards.

For small and remote islands, a Western narrative, originating with the ancient Greeks, has traditionally portrayed them as natural sites of ideal societies (Bertolini, 2020, pp. 284–287). The reality of insularity, however, characterized by isolation, limited natural and human resources, high transportation costs, and difficulties in projecting power, has distanced their governance systems from these idealized models. The archipelagic condition, marked by inter-island diversity, cultural and social pluralism, and political heterogeneity, necessitates moving beyond reductionist approaches that conceive of these territories as singular and unitary entities. Such approaches tend to obscure internal structural tensions and the plurality of lived experience, including, in certain cases, significant differences in the identities and political ambitions of the communities that collectively constitute a single political territory (Prinsen et al., 2021, p. 224). Scholars have highlighted the emergence of forms of indigenous island sovereignty (Grydehøj, 2017, p. 9), which exacerbate rivalries and tensions between islands, whether constituted as states or incorporated into other political-administrative frameworks with varying levels of autonomy (Roitman & Veenendaal, 2023; Prinsen et al., 2021). In the specific case of the Azores, there is limited scholarship addressing these rivalries, though empirical evidence confirms their existence (Baldacchino & Ferreira, 2013; Enes, 1999).

The highly violent and bloody events that occurred on several islands of the Azores during the third decade of the 19th century, which for the purposes of this study conclude with the departure of the Liberal Expedition that landed north of the city of Porto, thus initiating another civil conflict on the Portuguese mainland, have been interpreted by historiography as a significant episode in the national context

of the establishment of liberalism. Within this framework, the central research question was formulated as follows: “What role did the insular geography of the Azores play in shaping the behavior of actors during the conflict of 1821–1831?” From this, a related subquestion was derived: “To what extent can these conflicts be classified as a civil war?” The working hypothesis, to be tested through qualitative analysis, is that: “The archipelagic condition enhances the empowerment of local political elites, who attempt to balance these geopolitical powers through processes of conflict.”

The original contribution of this study lies in its integration of classical geopolitical concepts and theories to understand and anticipate the dynamics of power, cooperation, and conflict within island communities.

The distinctive rationality of the human and social sciences, given that their objects of study possess agency and will, and share the same reality sphere as the researcher, introduces new methods of understanding beyond purely historical analysis, situating phenomena within a broader social context, in contrast to the causal and formally logical explanatory schemes of naturalist models. Epistemology, conceived as a communicative dialectic among methodological procedures that are sometimes traditionally opposed, underpins scientific understanding and explanation, allowing for integration into diverse scientific approaches (Luz, 2002, pp. 78–97). Following a positivist-inspired methodological framework, this research relied on qualitative analysis, as the dynamics of geopolitical power are not fully quantifiable, examining relevant contributions including scientific articles, book chapters, and monographs, with particular emphasis on recent, specialized publications.

This article is structured into four sections: the present introduction, a literature review of relevant (though not exhaustive) concepts and theoretical frameworks, a case study and its analysis forming the empirical core, and a conclusion in which the principal research findings are systematically presented.

2. Literature review of the main key concepts used

Theories aim to organize and simplify the complexity of reality, enabling hypotheses to be systematically formulated and tested, while recognizing that such simplifications inevitably involve epistemological choices and limitations in representing reality. In this study, geopolitics is employed as a guiding paradigm (Kuhn, 2021, pp. 225–240) to examine how the geographical configuration of the Azores shaped patterns of conflict and cooperation among its communities, which remained influenced by external factors. This framework facilitates an understanding of the outbreak of the civil war during the third decade of the 19th century, while acknowledging that social, cultural, economic, and historical dimensions also play complementary roles in explaining the phenomenon.

2.1. Framing the geopolitical theory of Checkerboards

Although there is no consensus on the definition of geopolitics (Tomé, 2010, p. 50; Correia, 2012, p. 231), and despite its often overly broad and ambiguous use with respect to international relations, it is generally agreed that, broadly speaking, geopolitics refers to the impact of geographical factors on a country's foreign policy and diplomacy (Kelly, 1997, p. 1).

Geopolitics primarily focuses on the analysis and projection of power relations in territorial conflicts and cooperation among political actors, principally states, but also including supranational and sub-state entities (Lacoste, 2008, pp. 7–10). When examining disputes over territorial control involving actors with conflicting interests, even at the intranational level, these relations can be analyzed geopolitically (Subra, 2012, p. XIII), applying conceptual and analytical frameworks that encompass actors, strategies, power and its balances, conflict, rivalries, territory, and representation. In the case of small islands within a non-sovereign archipelago or similar territories, power analysis may consider either its relevance in international relations (Golan, 2024, p. 279; Balbim, 2016) or, as in this study, how each island leverages the power afforded by its geographical position to engage with the external environment.

A theory identifies connections between concepts that can describe, explain, and predict specific events (Kelly, 1997, p. 23). In geopolitics, distinguishing a concept from a theory is often challenging due to their high degree of interconnectivity (Kelly, 2016).

The geopolitical concepts of checkerboard and shatterbelt (Kelly, 1997) are used to explain how geographical features influence regional integration and the projection of power. Initially developed to analyze South American foreign policy, these concepts were also applied by Kelly to study the Peloponnesian War (Kelly, 2016, pp. 137–144). Checkerboards represent multipolar structures of power balance in which “my neighbor is my enemy, but my neighbor's neighbor is my friend” (Kelly, 1997, p. vii), a pattern that impedes continental unification. Shatterbelts denote regions where military rivalries among external powers intersect with local disputes, fostering conditions conducive to conflict escalation (Carvalho, 2015, p. 106). These concepts have been employed to interpret various geopolitical phenomena, as exemplified by Adel (2023) and Chakravarty (2025).

In republican South America, these dynamics manifested when Brazil, Chile, and Colombia occasionally aligned against neighboring states—Argentina, Peru, and Venezuela—resulting in the formation of shatterbelts. Such configurations obstructed continental unity, hindered the development of a cohesive South American geopolitical framework, and limited the strategic projection of power beyond the continent. The interplay of continental resources and topography, the spatial distribution of republics and regions, peripheral isolation, reactive positioning toward great powers, and the overlapping European and Anglo-American maritime and

continental geopolitical traditions collectively fostered a distinctive geopolitical environment. This environment facilitated the emergence of checkerboards, shatterbelts, buffer states, spheres of influence, and the persistence of border conflicts (Kelly, 1997, p. 214).

2.2. Civil War

Civil wars are armed conflicts that occur within the borders of existing political units or states (Toft, 2024, p. 1), typically driven by disputes over power, identity, territory, and political organization, and represent the most common form of political violence. Classifying intentionally organized internal violence, amplified by weak public institutions, cultural divisions, and political polarization, as a civil war is neither universally agreed upon nor straightforward. Nevertheless, distinguishing factors include the capacity of rival groups to inflict serious harm on their opponents, often resulting in a significant number of deaths, which, depending on the academic source, may range from twenty-five to one thousand per year, with or without adjustment for demographic proportionality, as well as the involvement of the central government in the conflict (Toft, 2024, pp. 1–35). Several historical and contemporary conflicts on islands and archipelagos with geographic and demographic characteristics similar to those of the Azores, recognized as civil wars by multiple scholars (Wallenstein et al., 2009; Pollock, 2014), provide a comparative framework that supports categorizing the present case study as a civil war.

3. The First Azorean Civil War: Case Analysis

The establishment of the *Capitania-Geral* of the Azores in 1766 represented a rupture with the previous system of *capitanias*, under which each island, except Flores and Corvo (Leite, 2008, p. 333), maintained a direct dependency on the king. This reform consolidated a civil and military administrative centralized superstructure with archipelagic reach, headquartered on Terceira Island, and coordinated with the preexisting and well-established ecclesiastical organization in Angra. The withdrawal of privileges and authority from the subordinate island elites generated pockets of discontent (Maia, 1988, p. 9; João, 1991, p. 217), which exploited the complex, conflictual, and violent context of the Portuguese liberal movement to reassert an administrative configuration that maximized the autonomy of each island. This phenomenon, examined here over the period 1820–1831, unfolded in three overlapping phases—administrative separatism, the era of the exiles, and liberal occupation—and is analyzed from a geopolitical perspective.

3.1. Historical Tensions and Inter-Island Rivalries

Between the discovery and settlement of the nine islands of the Azores, a considerable period elapsed, arising from the assessment of territorial viability, the introduction cattle, and subsequent human occupation (Carita, 2008, pp.

54–57). Settlement proceeded from east to west at varying paces, between the 1430s and the first half of the sixteenth century (Meneses, 2008, pp. 63–74). These new possessions of the Crown were granted through a system resembling feudal concessions (Saldanha, 1992, p. 22) the *donatarias*. The king conferred sovereign rights, adapting models existing elsewhere in the kingdom to local circumstances. The land grants and their subdivision into *capitanias*, one per island, except for Terceira, which had two (Meneses, 1995, pp. 62–63), and Flores and Corvo, which constituted a second grant (Gregório, 2008, p. 111), provided the political and administrative framework for the allocation of the scarce lands of the newly settled islands (Gregório, 2020). This organization remained largely unchanged for more than three centuries, even following the islands' formal incorporation into the Crown (Meneses, 1995, p. 89), the Spanish occupation and the Restoration of the Portuguese Kingdom in 1640.

The political authority of these territories was thus characterized by the absence of a regional centre, contrasting with the well-defined religious hierarchy. The political autonomy of each *capitão-do-donatário* was circumscribed only by the requirement of loyalty to the sovereign, a condition that, in light of contemporary perspectives, was reinforced, allowing the islands to remain within the Portuguese Crown without major conflicts.

The *donatarias* were organized into *capitanias*, each administered by a *capitão-do-donatário*. Only the Crown retained supreme jurisdiction over capital matters such as the minting and circulation of currency, the declaration of war, the imposition of the death penalty, and corporal punishments of amputation (Dávila, 2020, p. 49). Within their territories, the *capitão-do-donatário* exercised monopolistic control over the production of cereal flour and the trade in salt, as well as the collection of rents and tithes.

Each *capitania* was responsible for the military defence of its territory, ensured through the permanent establishment of small land-based forces—primarily militias—and the construction and maintenance of defensive infrastructure, particularly along the coast (Leite, 2008, pp. 340–345), as maritime threats were the principal concern. *Capitão-do-donatário* also held direct influence over the appointment of municipal councils and the boards of the hospitals (Leite, 2008, p. 329). In effect, each *capitão-do-donatário* exercised nearly all the functions now attributed to a sovereign state, rendering each island politically autonomous.

3.2. Administrative Fragmentation to Liberal Occupation: The Azorean Conflict

The period under analysis is divided into three interconnected and partially overlapping phases, each directly conditioned by national and international events. These phases are designated in this study as: administrative separatism, period of exiles, and liberal occupation. The chronology and description of events presented

here are largely based on the work of Rodrigues and Fernandes (2008), supplemented, were pertinent, by references to other historiographical sources.

On 1 March 1821, a military uprising, resulting from the convergence of liberal ideology, demands for administrative autonomy, and bribery (Maia, 1988, p. 180), peacefully established an Interim General Government on the island of São Miguel, which adhered to the constitutional regime instituted the previous year in the mainland. On 10 March, a local decree enshrined the unilateral separation of São Miguel from Terceira. Subsequently, on 2 May, the formal recognition by the Regency of the Kingdom of the São Miguel government sanctioned the separation of the islands of the Eastern Group from the rest of the territory of the *Capitania-Geral*, which was extinguished for the first time in February 1822 (Dias, 2011, p. 149). On 12 May, the islands of Faial and Pico also adhered to constitutionalism, forming their own Governing Junta and claiming, in a manner analogous to São Miguel, separation from the administrative authority based in Terceira.

In Angra, where neither *capitão-general* Francisco Stockler nor the bishop had sworn allegiance to the Constitution, a local movement deposed the governor on 2 April, and the Provisional Junta appointed the former *capitão-general*, an extensively unpopular figure, as governor. The weak local implantation of liberal ideology, a consequence of persistent opposition campaigns by the clergy and landowners, coupled with the absence of alternative mobilizing factors as observed in the other two cases, proved insufficient to secure political cohesion or broad popular support. This allowed an absolutist counter-revolution to emerge in a short period, employing violence, in which the bishop played an active role, deposing and assassinating Araújo de Azevedo, president of the Junta, and violently persecuting, imprisoning, and expelling from the island, with the acquiescence of Stockler, who had meanwhile been reinstated as governor, those deemed supporters of the 2 April movement.

Until August 1823, following the achievement of administrative separatism, the archipelago was organized into three autonomous districts. With the re-establishment of the *Capitania-Geral* in August 1823, administration was again entrusted to Francisco Stockler, who had been imprisoned in the mainland along with the Bishop of Angra between June 1821 and June 1823. A renewed period of violence emerged on Terceira Island, marked by purges and persecutions.

Upon Stockler's return to the Azores, approximately 500 members of the *Batalhão de Caçadores n.º 5* also arrived in exile (Maia, 1988, p. 265), serving as a mechanism to restrain his authority (Rodrigues & Fernandes, 2008, p. 461). Following Stockler's in June 1824 by Tovar de Albuquerque, a period of relative political stability ensued. In this context, exiles from the *Amazonas* (alleged collaborators of the First French Invasion, associated with Freemasonry and revolutionary ideals, arrested in Lisbon in 1810 and deported to Terceira Island aboard the frigate *Amazonas*), together with deported military personnel (Enes, 2008), were able, in coordination with

segments of the local elites, to contribute to the progressive consolidation of liberal ideas throughout the archipelago.

The year 1828 marks the beginning of the absolutist government with the return of Dom Miguel from Austria and represents the most violent phase of the civil war in the Azores. On 22 June, on Terceira Island, following the prior acclamation and oath of allegiance to Dom Miguel on 18 May, forces of the *Batalhão de Caçadores* n.º 5, supported by exiled liberals and local factions, proclaimed Dom Pedro IV, established an interim government, and arrested the Captain-General, who subsequently fled to São Miguel. A new absolutist governor, Sousa Prego, prevented from assuming office in Terceira, took up functions in Ponta Delgada.

The fragility of local support for the provisional government, as evidenced by clashes such as that at Pico Seleiro, necessitated the reinforcement of Terceira's military presence. This was achieved through the deployment of several thousand liberal volunteer emigrants and mercenaries, initially hampered by the British blockade of the island, which concluded in June with a change of government in London, ensuring the continued liberal presence on Terceira. The strengthening of liberal forces, combined with the progressive unification and disciplining of the interim government, facilitated the consolidation of political and military control over Terceira. Following the repulsion of the absolutist army landing at Praia, Terceira was established as the strategic centre of liberalism within an archipelago largely loyal to absolutist forces.

In 1831, conditions were deemed favorable for the extension of liberal control from Terceira to the remaining islands. On 17 April, a naval force composed of three small schooners and a brig departed from Angra bound for Pico (Maia, 1988, p. 360). On 21 April, Pico adhered to the regency without resistance. Adverse weather conditions prevented an immediate landing on Faial, leading the liberal forces to redirect their operation to São Jorge, which was taken by force on 9 May. Faial was subsequently occupied on 23 June, following a process marked by deception, uncertainty, and defections on both sides, thereby concluding the objectives of this first naval expedition.

The submission of Graciosa, on 10 July, and of Flores and Corvo, on 20 July, was achieved through negotiation rather than military confrontation. The final phase of the campaign commenced on 1 August with the landing on São Miguel of a force of approximately 1,500 men, composed of local troops and emigrants, who had departed from Terceira on 30 July aboard 36 small vessels. By the end of the second day of operations, after several engagements with absolutist forces between Achadinha and Ribeira Grande, effective control of the island had been secured. The regency was subsequently acclaimed in São Miguel and accepted in Santa Maria, thereby completing the liberal occupation of the Azores.

3.3. The Numbers of Violence

At the time, the Azores had an estimated population of approximately 190,000 inhabitants (Matoso & Sousa, 2008, p. 553), unevenly distributed across the nine islands. The assessment of violence cannot be restricted solely to the number of deaths, but must also account for the wounded, imprisoned, tortured, exiled, and the broader impacts experienced by civilian populations, effects that were particularly significant on the smaller islands. The rigorous quantification of such data is complex; for this study, information was drawn and transcribed from Maia (1988), *Collecção dos Documentos Officiais Relativos aos Últimos Acontecimentos das Ilhas dos Açores* (1831), and Avellar (1990).

The assassination of Araújo de Azevedo in 1821, followed by the systematic persecution of his supporters, heralded a climate of near-permanent violence, particularly concentrated on Terceira Island, the seat of the factional governments. Numerous qualitative accounts attest to episodes of absolutist guerrilla warfare, as well as attacks on private property, reflecting a persistent pattern of civil and military disorder.

The Battle of Pico Celeiro, on 3 October 1828, involved over 3,000 local forces confronting 150 liberal combatants on Terceira. The military experience of the liberal emigrants resulted in the decisive defeat of the royalist militias, many of whom were massacred while fleeing. The Battle of Praia, the Miguelist attempt to land forces in August 1829 to overthrow the liberal government, is estimated to have caused a similar number of casualties on both sides, totaling approximately 900 dead, wounded, or missing. The capture of São Jorge resulted in around 200 casualties, while the capture of São Miguel accounted for over 400 casualties. These figures represent, on small islands a significant proportion of their populations, underscoring the intensity and human cost of the conflict.

3.4. Analysis and Discussion of Results

The analysis highlights two main point. The first is that the violent political events that unfolded in the Azores during the third decade of the 19th century can be classified as a regional civil war, as they occurred exclusively within the archipelago's borders, without direct intervention from other states, and involved local actors seeking to maintain a monopoly on the use of force, even at the cost of secession by parts of the territory, in accordance with a definition of civil war (Gersovitz & Kriger, 2013, pp. 160–161).

The second point is that spatial configuration of the archipelago, combined with the model of political administration established during the settlement process, contributed to the formation of functionally autonomous island units. These units prioritized commercial relations with external markets over inter-island interactions, in a centrifugal pattern that persists today. This structure operated within a checkerboard framework: multipolar power balance arrangements in which

immediately neighboring political units were perceived as adversaries, while more distant units could be considered allies.

The imposition of the *Capitania-Geral*, without negotiation, introduced a centralist civil and military administrative model that disrupted the existing balance of power. The islands of São Miguel and Faial, key hubs of external trade and far more economically connected to the outside world than to other islands (João, 1991, pp. 123–134), began to regard Terceira as a rival. Initially, the conflict remained in a state of entente due to the presence of a strong central state. However, the events of 1820 in the mainland exacerbated divisions, resentments, political exclusion, and economic inequality, compounded by weak institutions/conditions conducive to civil conflict (Toft, 2024, pp. 2–3), which ultimately materialized in the Azores. In the first, moderately violent phase, administrative separatism emerged with the creation of two political units, later evolving into a full-scale civil war, as previously described.

The outcome of this conflict, in terms of political administration, was the *de facto* extinction of the *Capitania-Geral* in 1836, which no longer functioned according to the model established in 1820. Consequently, the archipelago remained divided into three administrative districts for more than 140 years.

While geography was not a deterministic factor in the behavior of political actors, it facilitated the empowerment of local elites, who sought to balance geopolitical power through conflict. These processes escalated into open violence when the perceived equilibrium was threatened, and the institutions of the state proved too weak to mitigate tensions.

4. Conclusions and Recommendations

This study qualitatively demonstrated that the geographical configuration of the Azorean archipelago, in conjunction with its historical process of colonization and relevant external contexts, shaped the dynamics of power creation, conflict, and cooperation among the island elites. Each island was thus configured as an autonomous political unit, with conflicts arising whenever regional administrative centralism was imposed. These findings allow us to conclude and answer the central research question: the checkerboard structure created conditions conducive to the outbreak of a regional civil war, in which political actors adjusted their ideological positions—as exemplified by São Miguel and Faial—to maximize relative power during the conflict.

Within this analytical framework, the presence of a central government in the Azores emerges historically as a temporary exception to a persistent trend of administrative fragmentation among the islands.

The limited literature on this subject constrains the possibility of comparative analysis with other archipelagic political systems, highlighting the need for future

research. Such studies could, for instance, explore patterns of political behavior among archipelagos in both national and international contexts, thereby broadening the understanding of intra-regional power dynamics and conflict in peripheral territories.

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