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# Lifetime Legacies

## The Mário Soares Foundation and the Lula Institute: Political Projects and Democratic Values in the Lusophone World

### Legados em vida

A Fundação Mário Soares e o Instituto Lula:

Projetos políticos e valores democráticos no mundo lusófono

AMÉRICO OSCAR GUICHARD FREIRE\*

**ABSTRACT** In recent decades, contemporary democracies have watched initiatives led by former heads of state that sought to establish entities dedicated to preserving and publicizing the legacies of their administrations. This growing trend, inspired by the presidential museum-libraries of the United States, is gaining momentum across Europe and Latin America. The Mario Soares Foundation (FMS), based in Lisbon, and the Lula Institute (IL), in São Paulo, constitute two important experiences. Both institutions, founded and overseen by their respective patrons, exemplify a new breed of presidential memorial centers that operate within a multifaceted framework: they are civil organizations that meet the legal conditions to receive private support and public subsidies; they curate and disseminate the presidents' collections, while also spearheading programs that revolve around the historical presence

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of the patron and his party. Furthermore, they serve as platforms that bring together ideas and propositions about the country's destinies. This article focuses on three facets of the trajectories of the FMS and the IL: their institutional profiles, the political narratives they embody, and the strategic projects they endorse.

**KEYWORDS** Presidency of the Republic, presidential memorial centers, political legacies

**RESUMO** Nas últimas décadas, as democracias contemporâneas de corte republicano têm acompanhado a iniciativa de ex-chefes de Estado em promover a criação de entidades que se voltam à defesa e à divulgação do legado de seus governos. Essas iniciativas, cujo ponto de referência são os museus-bibliotecas presidenciais dos Estados Unidos, avançam pela Europa e pela América Latina, e têm na Fundação Mario Soares (FMS), sediada em Lisboa, e no Instituto Lula (IL), em São Paulo, duas experiências significativas. Criadas e conduzidas pelos seus respectivos patronos, ambas são exemplares de uma nova geração de centros memoriais presidenciais que operam em registro múltiplo: são órgãos de caráter civil que reúnem condições legais para receber apoio privado e subvenções públicas; promovem a organização e a divulgação dos acervos dos presidentes, assim como lançam programas que giram em torno da presença histórica do patrono e de sua agremiação. São, também, plataformas que agregam ideias e proposições dirigidas para os destinos do país. Nosso foco, no presente texto, concentra-se em três questões relativas à trajetória da FMS e do IL: perfil institucional, narrativa política e projetos estratégicos.

**PALAVRAS-CHAVE** Presidência da República, centros memoriais presidenciais, legados políticos

Presidents of the Republic, regardless of the system of government, are key figures in the structure and *modus operandi* of contemporary democracies. The presidency typically assumes responsibilities in sensitive areas of the state, such as foreign relations, internal defense, and

relationships between government branches. It also has direct government responsibilities in presidential and even semi-presidential systems.

The presidency is also granted the exclusive and sovereign prerogative to exercise individual grace and pardon for convicts. Gloeckner, drawing on Hespanha (2010; 2012), points out that clemency, or the “economy of grace”, originates from the establishment of monarchical regimes and is connected to “royal law and the figure of the king himself, who should be loved more than feared”. In this context, criminal law “was not the only way of exercising social control (since the deontology of the power to rule also included the exercise of clemency)”. Grace, Gloeckner warns, “was not arbitrary, but closely related to the supreme Good”. Thus, he concludes, “the prince’s power over clemency is justified not as a violation of justice, but as its complement, that is, as supreme clemency”.<sup>1</sup>

The monarch thus constitutes a *sui generis* political figure who is part of the political-institutional system and overlaps with it, embodying the demands of both the time of circumstances, the day-to-day disputes for power, and those connected to the application of justice and the exercise of good. He or she would be ultimately responsible for protecting that nationality. In the Republic, however, the prerogatives of government and sovereignty cease at the end of the presidential term, when the holder of those powers returns to civilian, ordinary life. Despite this, governments implement measures to ensure the safety of the president and his or her family. Therefore, this cycle is only complete when the figure of the former president is also considered.

When we examine the trajectory of former presidents of the United States of America, for instance, two aspects reveal how the

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1 GLOECKNER, Ricardo Jacobsen. Os paradoxos da concessão de graça pelo Presidente da República. In: *Canal Ciências Criminais*, 11 Aug. 2022. Available at: <https://canalcienciascriminais.com.br/os-paradoxos-da-concessao-de-graca-pelo-presidente-da-republica>. Access on: 1 May 2023. Freely translated: “economia da graça”; “ao direito régio e à própria figura do rei, que se deveria fazer amar mais do que ser temido”; “não era a única forma de se exercer o controle social (uma vez que à deontologia do poder de reinar também se acrescia o exercício da clemência)”; “não era arbitrária, estando em franca relação com o Bem supremo”; “o poder do príncipe sobre a clemência é justificad[o] não como uma violação da justiça, mas como o seu complemento, ou seja, como clemência suprema”.

mystique that surrounds and constitutes the presidency extends to the former office holder. Levitsky and Ziblatt (2018, p. 130), in their analysis of the informal rules that guide the democracy of that country, highlight the continuous practice by presidents of the Republic of policies of restraint, both in their relations with the courts and with Congress. According to these authors, “outside of wartime, they [the presidents] were judicious in their use of executive orders”, and they conclude: “Even in the absence of constitutional barriers, unilateral executive action remained largely a wartime exception, rather than the rule”.

Once out of office, this informal rule is adapted to the new situation, with the former president now expected to maintain a dignified, discreet, self-sacrificing position, focused on the common good and distanced from party political bickering. However, during and after Donald Trump’s presidency, the restraint policy has given way to what the literature refers to as “constitutional hardball” (LEVITSKY; ZIBLATT, 2018, p. 176-203).

In addition to the dignified and detached demeanor exhibited by former presidents, an attitude that still prevails among them, there is a tradition of their direct involvement in establishing entities or monuments, usually in their home states. The central aim is to cement their names in the country’s long presidential history. Presidential museums or libraries are responsible for collecting, organizing, and disseminating the accomplishments of the president, but particularly of the presidency. These institutions are usually built around private archives and donated to the Union when the documents are deposited there.<sup>2</sup> They primarily serve as government archives, making up a vast network administered by the Office of Presidential Libraries, a body affiliated with the National Archives and Records Administration.<sup>3</sup>

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2 About US presidential libraries and museums, see the legal and historical overview in Novaes (2014, p. 45-61). See also: ARDAILLON, Danielle. Interviewer: Luciana Heymann. FGV CPDOC, 2007, p. 24-25. Available at: <https://www18.fgv.br/cpdoc/storage/historal/arq/Entrevista1518.pdf>. Access on: 1 May 2023.

3 See: NATIONAL ARCHIVES. *Presidential Libraries*. Available at: <https://www.archives.gov/presidential-libraries>. Access on: 1 May 2023.

Outside the United States, several initiatives by former presidents and their supporters have led to the creation of memorial centers that do not replicate the aforementioned monumental model. In addition to the establishment of official memorials that pay posthumous homage to presidents recognized as “national heroes”,<sup>4</sup> recent decades have seen the formation of organizations that operate on multiple levels. These are civil bodies that meet the legal conditions to receive private support and public subsidies; they promote the organization and dissemination of the president’s collection, at the same time initiating programs that revolve around the historical presence of the patron and his association. Finally, they serve as platforms that aggregate ideas and propositions directed towards the country’s destinies.<sup>5</sup>

In the Lusophone world, there are some relevant initiatives related to the creation of presidential memorial centers. They have been working in an integrated manner in the fields mentioned above: document storage, historical narrative, and discussion of future agendas. Two of these centers are sister institutions: the Fundação Mário Soares e Maria Barroso [Mário Soares and Maria Barroso Foundation] (FMS),<sup>6</sup> based in Lisbon, and the Fundação Fernando Henrique Cardoso [Fernando Henrique Cardoso Foundation] (FFHC), located in São Paulo. The latter, according to Cardoso’s express testimony, was directly inspired by

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4 See, for example, the mausoleum dedicated to former Venezuelan president Hugo Chávez in the dependencies of the Cuartel de la Montaña, located near Caracas. His remains are laid to rest there. INFOGRAFÍA: Así es la flor donde descansa Chávez. In: *Últimas Noticias*, 17 Mar. 2013. Available at: <https://web.archive.org/web/20140103205624/http://www.ultimasnoticias.com.ve/noticias/ciudad/parroquias/infografia---asi-es-la-flor-donde-descansa-chavez.aspx>. Access on: 1 May 2023.

5 In this regard, see the experience of the Instituto Patria [Homeland Institute], created and chaired by Cristina Kirchner, the current vice-president of Argentina: *Instituto Patria: Pensamiento, Acción y Trabajo para la Inclusión Americana*. Available at: <https://www.institutopatria.com.ar/>. Access on: 1 May 2023.

6 In this text, we have chosen to always use the institution’s original name: Fundação Mário Soares.

the former.<sup>7</sup> The Instituto Lula [Lula Institute] (IL), led by the current president and also based in São Paulo, is another such center. Although it was established in the 1990s with other purposes and under a different name, it has more recently and under its current designation excelled in its role as an entity directly linked to the name and career of its patron.

This article examines the work of the Fundação Mário Soares and the Instituto Lula in two ways. Firstly, we seek to outline a profile of each of these entities, considering aspects such as the constitution of the memorial center, its articulations, teams, collection assembly and policies, external dissemination programs and events, and national and international projection.

Secondly, we will study the narratives produced within these organizations around their patrons and the corresponding political family – the Socialists and the *Petistas*, as well as initiatives and projects that can be seen as strategic for the future of the FMS and the IL. The focus will be on *Casa Comum* [Common House], a platform organized and maintained by the FMS that provides extensive documentation from countries and organizations in the Comunidade dos Países de Língua Portuguesa [Community of Portuguese Language Countries] (CPLP), and *Memorial da Democracia* [Democracy Memorial], a virtual museum produced by the Instituto Lula “to contribute to the recovery of the memory of our people’s struggles for democracy, equality, and social justice”.<sup>8</sup> In conclusion, we will present brief reflections on the role that these memorial centers play in the public spaces of contemporary democracies.

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7 CARDOSO, Fernando Henrique. Interviewer: Luciana Heymann. FGV CPDOC, 2007, p. 15-16. Available at: <https://www18.fgv.br/cpd/doc/storage/historal/arq/Entrevista1519.pdf>. Access on: 1 May 2023. About this subject, as well as the work carried out by the Fundação Fernando Henrique Cardoso in the construction of a certain image of the patron, see Heymann’s (2009, p. 51-65) study.

8 *Memorial da Democracia*. Available at: <http://memorialdademocracia.com.br/>. Access on: 1 May 2023. Freely translated: “com o objetivo de contribuir para o resgate da memória das lutas de nosso povo pela democracia, pela igualdade e pela justiça social”.

## FUNDAÇÃO MÁRIO SOARES: FORMATION AND INSTITUTIONAL PROFILE

The two organizations addressed in this article were established in the 1990s. The FMS, founded in 1991, commenced its activities 5 years later, shortly after the end of Mário Soares' second presidential term (1991-1996). Upon its inauguration, the former president clarified in a brief statement to the *Rádiatelevisão Portuguesa* [Portuguese Radiotelevision Network] (RTP) two significant points about his intentions with this initiative: it would not have a partisan nature nor fuel possible candidacies for public office in the future. It was an organization focused on culture and should not serve as a "springboard" for anything. Soares stated: "I don't need a springboard".<sup>9</sup>

It appears that Soares had set up the conditions for the organization during his first presidential term (1986-1991). So much so that, a few months after being re-elected by a wide margin, he had in hand the names of the management team, the financial resources, and the necessary documentation to draw up the deed for the organization in September 1991.<sup>10</sup> By that time, the FMS was beginning to take shape according to the statutes presented there.

The FMS was established as a non-profit institution under private law and of public utility, aimed at carrying out, promoting, and sponsoring cultural, scientific, and educational actions and studies in human rights, political science, and international relations. The organization, maintained with resources from public subsidies, private support via patronage, and its own funds, was initially constituted of the presidency and the administrative, fiscal, and general boards. Later, an executive body was created to manage its day-to-day operations. In August 2020, the

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9 INAUGURAÇÃO da Fundação Mário Soares. *RTP Arquivos*, 4 June 1996. Available at: <https://arquivos.rtp.pt/conteudos/inauguracao-da-fundacao-mario-soares/>. Access on: 1 May 2023. Freely translated: "eu lá preciso de trampolim".

10 ESCRITURA da Fundação Mário Soares, 12 Sept. 1991. In: *Fundação Mário Soares e Maria Barroso*. Available at: [https://fmsoaresbarroso.pt/fundacao/lei24/docs/escritura\\_fms.pdf](https://fmsoaresbarroso.pt/fundacao/lei24/docs/escritura_fms.pdf). Access on: 1 May 2023.



FMS changed its statutes and was renamed the Fundação Mário Soares e Maria Barroso. Currently, its mission is to promote a civic and democratic culture inspired by the life and legacies of Mário Soares and Maria Barroso and to preserve and disseminate the historical memory and cultural heritage of contemporary Portugal, in addition to having freedom, tolerance, solidarity, equality, and citizenship as its guiding principles.<sup>11</sup>

After his term as head of state, Soares became the organization's president for life. On the Board of Directors, he was flanked by his daughter, Maria Isabel Barroso Lopes Soares, and by his close friends and associates. This included José Magalhães Saldanha Gomes da Motta, former military officer, economist, businessman, and director of his campaigns for the presidency of the Republic; Carlos Augusto Pulido Valente Monjardino, businessman and later Deputy Secretary to the Governor of Macau and president of the Museu do Oriente [Museum of the Orient]; and António Augusto Serra Campos Dias da Cunha, businessman and former sports manager. Lawyer Artur Eduardo Brochado dos Santos Silva and entrepreneurs Jorge Manuel Jardim Gonçalves and Raul de Almeida Capela formed the supervisory board. Carlos Barroso, a lawyer and Soares' nephew, was chosen to head the Executive Body, remaining in the FMS administration for 24 years until his death in May 2020. Alfredo Caldeira, another fundamental figure in the entity's administrative body, was responsible for projects aimed at enhancing its archive and library for decades.

The FMS's priority was to organize the papers of its patron, who had expressed his desire to make them available as soon as possible, during his lifetime (CALDEIRA, 2005, p. 130). Simultaneously, it pursued policies to build a collection that now houses a vast gallery of figures from the Portuguese political and cultural world, covering a significant portion of the history of republicanism and democratic socialism in the country. The archives comprise 73 documentary sets, 68 of which are personal collections. It also houses documents produced by periodicals

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11 See the institution's updated statutes: *Fundação Mário Soares e Maria Barroso*. Available at: [https://fmsoaresbarroso.pt/fundacao/lei24/docs/03\\_estatutos.pdf](https://fmsoaresbarroso.pt/fundacao/lei24/docs/03_estatutos.pdf). Access on: 1 May 2023.

like the *Diário de Lisboa*, and institutions, such as the Museu Maçônico/Grande Oriente Lusitano [Masonic Museum/Portuguese Grand Orient], the Fundação Nacional para a Alegria no Trabalho [National Foundation for Joy at Work] (FNAT), the Movimento das Forças Armadas [Armed Forces Movement] (MFA), and the Partido Socialista [Socialist Party] (PS).<sup>12</sup>

Personal archives are, as was to be expected, predominantly male, with only seven collections of women's papers deposited thus far. The majority of personalities represented were born in Portugal, with just one name from Brazil and seven from Angola, Guinea-Bissau, and Mozambique combined. On the political-ideological level, the collections can be categorized into four axes. The first comprises political and cultural leaders linked to the history and trajectory of Portuguese republicanism. The second brings together anti-Salazarist and anti-fascist activism from the 1930s to the 1960s, including a significant subset of names linked to groups and organizations that were at the origins of the Portuguese Partido Socialista. The third axis encompasses papers of personalities connected to the April 25, 1974, Revolution – politicians from various tendencies of the Portuguese left, particularly those associated with the PS, along with journalists, writers, activists, trade unionists, and military personnel identified with the overthrow of the Salazar regime. Finally, there is an axis related to the anti-colonial struggle, featuring documents from personalities linked to the Frente de Libertação de Moçambique [Mozambique Liberation Front] (Frelimo), the Movimento Popular de Libertação de Angola [Popular Movement for the Liberation of Angola] (MPLA), and the Partido Africano para a Independência da Guiné e Cabo Verde [African Party for the Independence of Guinea and Cape Verde] (PAIGC).

One of the most vital cultural decisions made by the organization's board was the creation of the Casa Museu – Centro Cultural João Soares [House Museum – Cultural Center João Soares], located in

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12 This data was collected on the *Casa Comum* platform. Available at: <http://casacomum.org/cc/arquivos>. Access on: 1 May 2023.

Cortes, near the city of Leiria, and built in honor of Soares' father, the pedagogue and republican activist João Soares.<sup>13</sup> The complex includes a library, educational spaces, temporary exhibitions with objects received by the patron during his government period, and a permanent exhibit about 20<sup>th</sup>-century Portuguese history. Comprising nine sections, the exhibition focuses on the history of republicanism and the fight for democracy in Portugal. The last section presents various documents on the years of Mário Soares' presidency.<sup>14</sup> The Casa Museu establishes the image of the Soares family as part of the country's political history.

Since the mid-1990s, two other initiatives led by the FMS board have contributed to strengthening the organization's ties with the Portuguese academic field, namely with the Instituto de História Contemporânea (IHC) of the Faculdade de Ciências Sociais e Humanas of the Universidade Nova de Lisboa (FCSH/UNL). These have included the Free Courses in Contemporary History, run in partnership with the IHC at UNL, and the Mário Soares Prize, awarded each year to original academic works on contemporary Portugal.

In addition to these regular activities, the FMS hosts and promotes events that have raised and discussed issues relating to the fate of Portuguese democracy. These include debates under the title *Desafios da democracia deliberativa e participativa* [Challenges of Deliberative and Participatory Democracy], held at the organization in July 2022, and the *Resistência no feminino* [Female Resistance] conference series – promoted by UNL in partnership with the FMS throughout 2023 –, whose main objective was to “recover memories and testimonies of women who resisted oppression, discrimination, and repression in different ways”.<sup>15</sup>

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13 For further detail, see: CASA Museu – Apresentação. In: *Fundação Mário Soares e Maria Barroso*. Available at: [https://fmsoaresbarroso.pt/casa\\_museu/apresentacao/](https://fmsoaresbarroso.pt/casa_museu/apresentacao/). Access on: 1 May 2023.

14 See information about the permanent exhibition in: SÉCULO XX português: Os caminhos da democracia – João Soares/Mário Soares. In: *Fundação Mário Soares e Maria Barroso*. Available at: [https://fmsoaresbarroso.pt/casa\\_museu/exposicao\\_longa\\_duracao/](https://fmsoaresbarroso.pt/casa_museu/exposicao_longa_duracao/). Access on: 1 May 2023.

15 APRESENTAÇÃO. In: *Resistência no feminino*. Available at: <https://resistenciafeminino.fcsh.unl.pt/apresentacao/>. Access on: 1 May 2023. Freely translated: “resgatar memórias e testemunhos

In the first decades of the new century, due to its collection profile and the national and international prestige of its patron, the FMS was able to support and sustain the creation and maintenance of memorial centers throughout the Portuguese-speaking world, particularly in countries such as Guinea Bissau and East Timor. The FMS's presence has been reflected in initiatives such as storing and digitizing the collections of leaders of the anti-colonial struggle, which have subsequently been donated to their countries of origin; holding joint academic events focusing on the importance of historical memory; preparing technical staff for sister centers; and sending technical teams from the entity to develop construction projects for centers such as the Memorial da Escravatura e do Tráfico Negroiro [Memorial to Slavery and the Slave Trade], which was erected in Cacheu, Guinea Bissau, in July 2016.<sup>16</sup> At the same time, the FMS has made progress in integration with these entities through the *Casa Comum* project.

Mário Soares was a constant presence at the FMS, regularly taking part in events held by the organization, including conferences, awards ceremonies, debates, tributes, etc. There, he remained active while sheltered from the direct and immediate clashes that marked party life. However, he was never aloof from the public debate on national and international issues. After being elected as a Member of the European Parliament (1999) and running unsuccessfully for the head of the European Parliament (2000), Soares made one last foray into party politics when he ran for President of the Republic (2003) at the age of 81. He only came third. He died in Lisbon in January 2017. Since then, Maria Isabel Soares, his daughter, has remained at the head of the FMS.

The FMS was one of the fruits of Mário Soares' presidential victories. After his second term in office, the Socialist leader had to find a place for himself in the national and international public debate. The FMS, in theory, should be that place – and indeed it was.

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de mulheres que resistiram de diferentes formas à opressão, discriminação e repressão?.

16 See: INAUGURADO memorial de escravatura. In: *União das Cidades Capitais de Língua Portuguesa*, 9 July 2016. Available at: <https://www.uccla.pt/noticias/inaugurado-memorial-de-escravatura-em-cacheu>. Access on: 1 May 2023.

## FROM PARALLEL GOVERNMENT TO THE INSTITUTO LULA

The Instituto Lula has a different origin history, dating back to the PT leader's first presidential run in the 1989 elections. On that occasion, Fernando Collor de Mello, representing the Partido da Reconstrução Nacional [National Reconstruction Party] (PRN), emerged as the winner in the second round with 49.84% of the votes, while the PT candidate secured 44.23% of the votes (ANT, 2002, p. 172-184).

After assessing the reasons for the defeat, Lula and his team initially tried to bring together the political front formed in the second round of the election to formulate alternative public policies to those of Fernando Collor's government. This collective was supposed to work like a "parallel government", as was common in the United Kingdom. The proposal received little support, but it paved the way for creating working groups that began to formulate projects to tackle Brazil's centuries-old problems. To maintain, coordinate, and organize the work of these groups, Lula took the initiative in 1990 to create the Instituto de Pesquisa e Estudo dos Trabalhadores [Workers' Research and Study Institute] (IPET), which was transformed three years later into the Instituto de Pesquisa e Estudo da Cidadania [Citizenship Research and Study Institute] (IC) (ANT, 2002, p. 172-184).

In the 1990s, after the fever of mobilizations that had marked the previous decade, the liberal agenda was imposed, either in a radical way during Fernando Collor's administration or tempered in Fernando Henrique Cardoso's two terms (1995-2002). For Lula and the Partido dos Trabalhadores, the last decade of the century was one of expansion and consolidation in the left-wing camp, alongside consecutive presidential defeats (1994 and 1998).

In those years of political off-season, Lula, having served as president of the PT for a few years (1990-1994), settled residence at the Instituto de Pesquisa e Estudo da Cidadania. There, removed from the day-to-day operations of the party's administration, he renewed contact with public figures and technical staff associated with universities. His aim was to formulate strategic public policies that could underpin a

new power project. To this end, the IC hosted numerous events in the 1990s and early 2000s, leading to the approval of fundamental documents on topics such as food security, agrarian reform, education, the Amazon, the Northeast, popular housing, combating poverty, etc. (ANT, 2022, p. 184-194). Many of these documents were later incorporated into Lula's candidate platform and government program during his first two presidential terms (2003-2010).

In 2011, when the PT leader was out of office, he created the Instituto Lula, a direct successor to the IC. To do this, he first met the legal and practical requirements regarding the safekeeping and maintenance of the personal papers produced during his presidency. After all, according to Brazilian legislation on the matter,<sup>17</sup> presidential documentation constitutes a private asset – hence the personal and non-transferable responsibility of the former president over that collection – of public interest (LOPES; RODRIGUES, 2019). Because of this, it would be the state's responsibility, in theory, to “define research support policies that would encourage archive owners to provide access to these documents”<sup>18</sup> (COSTA, 1998, p. 197). Nonetheless, in practical terms, since these support policies have not been implemented, the problem has grown and was summed up by former president Fernando Henrique Cardoso: “Taking care of the collection is an obligation, but there is no money”.<sup>19</sup>

In addition to managing its patron's documentary collection, the IL was conceived as a platform for maintaining the former president's international presence and projection. The organization therefore focuses on three fronts: strengthening ties with African countries,

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17 BRAZIL. Lei nº 8.394, de 30 de dezembro de 1991. Dispõe sobre a preservação, organização e proteção dos acervos documentais privados dos presidentes da República e dá outras providências. Available at: [https://www.planalto.gov.br/ccivil\\_03/leis/l8394.htm](https://www.planalto.gov.br/ccivil_03/leis/l8394.htm). Access on: 1 May 2023.

18 Freely translated: “definir políticas de apoio à pesquisa que estimulassem os proprietários dos arquivos a facultar o acesso a esses documentos”.

19 CRUZ, Bruna Souza; BEZERRA, Mirthyani. FHC na defesa de Lula: “Cuidar de acervo é obrigação, mas não há dinheiro”. In: *UOL*, 9 Feb. 2017. Available at: <https://noticias.uol.com.br/politica/ultimas-noticias/2017/02/09/fhc-na-defesa-de-lula-cuidar-de-acervo-e-obrigacao-mas-nao-ha-dinheiro.htm>. Access on: 1 May 2023.

advancing Latin American integration, and combating world hunger. In terms of political memory, the IL actively promotes the history of Lula and his government. It has also created a virtual museum to publicize the *Memorial da Democracia* project,<sup>20</sup> launched in 2015.

Lula, following a similar approach to Mário Soares, appointed people from his inner circle to make up the organization's board of directors. This includes Paulo Sakamoto, an administrator and comrade from the days of trade unionism; Paulo Vannuchi, a journalist and former minister of the Secretariat for Human Rights of the Presidency of the Republic (2005-2010); Clara Ant, an architect and former special advisor to the Presidency of the Republic (2003-2010); Luiz Dulci, a professor and former minister of the General Secretariat of the Presidency of the Republic (2003-2010); and Celso Marcondes, a journalist and communications advisor to Lula's government bodies. The IL is a non-profit organization with no party or religious ties and is supported by donations from companies and individuals.

From the outset, the IL's management directed efforts towards building an agenda to establish the organization's brand on the international circuit, taking advantage of the positive reception of the patron's name in multilateral forums and agencies. Two initiatives were crucial in achieving this goal: the dozens of trips undertaken by Lula and members of the IL abroad, particularly to Africa and Latin America, and the promotion of academic and political events addressing topics of international scope, often organized in collaboration with similar organizations. A noteworthy example was the *Fórum do Progresso Social* [*Social Progress Forum*], held in Paris in December 2012, in cooperation with the Fondation Jean-Jaurès.<sup>21</sup> These endeavors have led to positive outcomes and helped secure recognition and resources for the organization.

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20 *Memorial da Democracia*. Available at: <http://memorialdademocracia.com.br/>. Access on: 1 May 2023.

21 See initiatives and events of IL at: CONHEÇA a história e as atividades do Instituto Lula, de 1990 a 2015. In: *Lula*, 6 July 2016. Available at: <https://lula.com.br/conheca-historia-e-atividades-do-instituto-lula-de-1990-2015/>. Access on: 1 May 2023.

Internally, however, the picture is not the same. The organization has faced countless challenges in guaranteeing the preservation and availability of the patron's collection, which was temporarily deposited in a shed at the Sindicato dos Metalúrgicos do ABC<sup>22</sup> [ABC Metalworkers' Union] in São Bernardo do Campo and has remained there ever since. To start the work of digitizing and making it available, the entity signed agreements with the Fundação Perseu Abramo [Perseu Abramo Foundation], sponsored by the PT, and TVT, a broadcasting chain maintained by the Sindicato dos Metalúrgicos do ABC and the Sindicato dos Bancários e Financieiros de São Paulo, Osasco e Região [Bankers' and Financiers' Union of São Paulo, Osasco, and Region]. On the IL website, there is no specified deadline for the completion of this work of making Lula's collection available.

It is crucial to situate these problems in a critical political context, marked by the erosion of the government and the impeachment of former president Dilma Rousseff (2016), which had as one of its components the actions of segments of the Federal Justice system, namely those organized in the Lava Jato [Car Wash] task force, which accused several PT leaders, including former president Lula, of corruption. After being tried and convicted in the lower courts, Lula was arrested in April 2018. However, a Supreme Court decision released him in November the following year.<sup>23</sup>

As expected, the IL did not emerge unscathed from these tumultuous years. The notion that the former president had used the institute to commit a wide range of illicit acts and crimes, such as favoring companies in exchange for financial support for the entity and even

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22 The so-called "ABC Paulista" is an industrial zone situated southeast of São Paulo's metropolitan region, encompassing the municipalities of Santo André, São Bernardo do Campo, and São Caetano do Sul. Lula first rose to prominence as a political figure while serving as a trade unionist representing the region's metalworkers. See Morais (2021).

23 On the Brazilian political crisis, see different approaches in Singer (2018), Abranches (2018), Perlatto, Dulci, and Chaloub (2020). See also reports on Lula's arrest in Morais (2021) and Ant (2022).



promoting “international influence peddling”, gained ground among members of the justice system.

This led to strict judicial measures against the IL, including the suspension of the organization’s tax exemption on charges of misuse of purpose (August 2016), the breach of tax and bank secrecy (March 2016), and the suspension of the IL’s activities for investigation (May 2017), because the organization was deemed “a meeting place for the perpetration of various criminal offenses”.<sup>24</sup> All these measures, including the one suspending the IL’s activities, were later overturned by higher courts.

In recent years, the IL has resumed its agenda of activities, both internally and externally, and since 2020, it has been under new management. The new team is made up of Marcio Pochmann, an economist and former president of the Fundação Perseu Abramo (2012-2020); Paulo Sakamoto, historical leader of the organization; Tamires Sampaio, a lawyer and militant of the black movement; Juvandia Moreira Leite and Moisés Selerges, union leaders. Lula remains the IL’s honorary president. The management change brought new blood into the institute and signaled a greater incorporation of contemporary agendas – hence the space in the governing body for women and blacks. At the same time, it represents a strengthening of the institute’s ties with the Fundação Perseu Abramo – a political training organization linked to the PT –, with the Central Única dos Trabalhadores [Unified Workers’ Central] (CUT) and with the trade union movement in the ABC region of São Paulo – the cradle of Lula’s and his principal comrades’ leadership.

Lately, the IL has also expanded its range of activities on the internal front. In terms of training, it has held events and courses on various topics such as labor relations, new social inequalities, the climate

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24 JUIZ federal determina a suspensão das atividades do Instituto Lula. In: *Jornal Nacional*, 9 May 2017. Available at em: <https://g1.globo.com/jornal-nacional/noticia/2017/05/juiz-federal-determina-suspensao-das-atividades-do-instituto-lula.html>. Access on: 1 May 2023. Freely translated: “local de encontro para a perpetração de vários ilícitos criminais”. See the discussion of the topic in Ant (2022, p. 376).

crisis and sustainability, artificial intelligence, etc.<sup>25</sup> It has also launched calls for applications for awards and a line of research publications on themes of democracy and representativeness. Lastly, the IL uploads various contents onto YouTube publicizing the patron's and the organization's activities.

On the external front, the IL's presence has lost momentum compared to its launch and first five years. Now, the institute focuses on deepening relations with Latin American organizations and leaders.

## **BIOGRAPHICAL NARRATIVES AND STRATEGIC PROJECTS**

Presidential memorial centers, as mentioned, are places of memory built with the primary purpose of defending and disseminating the legacy of their patron. The same can be said of the two organizations in question. Thus, we should focus on the narratives on the FMS and IL websites about the trajectory of their creators, their governments, and political ideologies. We will then examine some of the projects that have opened up new perspectives for the future of the two organizations.

The FMS website offers a classic and concise biographical profile of its patron.<sup>26</sup> It is divided into an introduction with brief personal details (birth, family, marriage, death); a first section on university education and professional activities carried out in Portugal and France; two sections on political activities (one for the period before April 25 and another for what came after the Carnation Revolution); and two more on other activities in Portugal and abroad.

Regarding his political activities, Soares is portrayed as an anti-Salazar activist who worked directly and continuously since he was a university student in Lisbon in organizations that waged the democratic

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25 See ÁREA de formação In: *Instituto Lula*. Available at: <https://www.institutolula.org/formacao/formacao>. Access on: 1 May 2023.

26 See the biographical narrative in: BIOGRAFIA Mário Soares. In: *Fundação Mário Soares e Maria Barroso*. Available at: [https://fmsoaresbarroso.pt/mario\\_soares/biografia/](https://fmsoaresbarroso.pt/mario_soares/biografia/). Access on: 1 May 2023.

struggle against the dictatorial regime between the 1940s and 1960s, such as the Movimento de Unidade Nacional Antifascista [National Anti-Fascist Unity Movement] (MUNAF) and the Movimento de Unidade Democrática [Democratic Unity Movement] (MUD), for which he served as a member of the first Central Committee. His participation in coordinating the campaigns of presidential candidates who opposed Salazarism is also noteworthy, as are his arrests, deportation to Africa, and forced exile in France in the early 1970s. Finally, Soares' role in bringing together groups and leaders with the perspective of building an alternative form of power on the Portuguese left based on the socialist-democratic ideology should be highlighted. Hence the advent, in 1973, of the Partido Socialista, of which Soares was secretary-general.

As for the patron's presence in the post-April 25 period, the profile highlights the following: 1) the fight he waged inside and outside the government throughout 1975 against the "totalitarian perversion" that threatened the "original and democratic spirit of the April Revolution";<sup>27</sup> 2) Soares' role, as party leader, as prime minister and then as president of the Republic, in initiatives to democratize and institutionalize the revolutionary process; 3) his role on the international stage, whether in negotiations for recognition by European governments of the new Portuguese regime, or in adopting policies that favored Portugal's entry into the European bloc, or in negotiating and favoring the liberation processes of Portuguese possessions in Africa.

Soares thus appears as a democratic, socialist, modern/European, and anti-colonialist leader. As expected, his profile is coherent and complimentary but somewhat discreet, polite, controlled, and devoid of ostentation. This restrained attitude, by the way, is a trait that runs throughout the organization's communication with the public, and it is also evident in the way in which Portugal's contemporary political history is narrated in the long-term exhibition of the Casa Museu – Centro Cultural João Soares.

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27 BIOGRAFIA Mário Soares. In: *Fundação Mário Soares e Maria Barroso*. Freely translated: "perversão totalitária"; "espírito original e democrático da Revolução de Abril".

The FMS website presents the texts that guide this exhibition, aiming to provide an overview of Portuguese history in the 20<sup>th</sup> century.<sup>28</sup> The tone is austere and critical, following the political changes that marked contemporary Portugal between the crisis of the monarchical regime in the mid-19<sup>th</sup> century and the presidency of Mário Soares (1985-1996). Soares, in these texts, is not placed as a hero but rather as a political actor who, among others, fights Salazarism and participates in the construction of Portuguese democracy. The emphasis on the character only appears in the last two texts: *A institucionalização da democracia* [*The Institutionalization of Democracy*] (1976-1985) and *A Presidência da República* [*The Presidency of the Republic*] (1985-1996).

In these two narratives about the FMS's patron, there is no mention of Soares' direct involvement as a militant of the Portuguese Communist Party (PCP) in the 1940s and 1950s, although his participation in civil organizations linked to the party is well documented.<sup>29</sup> Such information could certainly overshadow the image that the FMS projected of its patron as a "Western leader" who had excelled in the fight against "totalitarian perversion" – in other words, communism. Nonetheless, the entity did not guide its collection policy through this ideological perspective. Instead, it has sought to collect, organize, and make available private archives of communist activists who left a mark in contemporary Portugal. The same happened with militants of far-left groups in Portugal that sometimes clashed directly with the PS and Mário Soares himself. The entity thus ends up propagating another political narrative that is much broader and more plural than the previous ones.<sup>30</sup>

On the IL website, the patron's career is presented in the section *Vida de Lula* [*Lula's Life*].<sup>31</sup> In this section, information is arranged

28 Texts about the long-term exhibition are available at: SÉCULO XX português: Os caminhos da democracia – João Soares/Mário Soares. In: *Fundação Mário Soares e Maria Barroso*.

29 In his books and testimonies, Mario Soares discussed his status as a PCP militant on numerous occasions. See Avillez (1996, p. 40-100) for an example.

30 On the multiple narratives present in presidential centers that operate through exhibitions and archives, see Novaes (2014).

31 VIDA de Lula. In: *Instituto Lula*. Available at: <https://portal.institutolula.org/o-instituto/>

in a detailed timeline in which episodes from Lula's career are cross-referenced with relevant political events. There are five subsections: *Primeiros anos* [Early Years] (up to 1969); *Sindicalista* [Trade Unionist] (1969-1980); *Carreira política* [Political Career] (1980-2013); *Presidente* [President] (2003-2011); *Vida após a Presidência* [Life after the Presidency] (2011-...). The focus is personal, and the character is treated as a man of humble origins who, with determination, faced challenges and built his destiny. The language is straightforward, informal, journalistic, and full of praise.

The following highlights appear in the subsections *Sindicalista* and *Carreira política*: Lula's leadership in the cycle of workers' strikes of unprecedented proportions; the military government's intervention in the Sindicato dos Metalúrgicos de São Bernardo do Campo [São Bernardo do Campo Metalworkers' Union], followed by the arrest of Lula and members of the entity's board of directors; the liberation, construction of the Partido dos Trabalhadores and articulation in the formation of the Central Única dos Trabalhadores; Lula being the most voted Federal Deputy in the country in the 1986 elections, and the defeated candidate for the presidency on three occasions, finally being elected to office in 2002.

The exceptional nature of Lula and his achievements is also highlighted in the section covering his years as President of the Republic. The PT leader is presented as the first worker to be installed in the Planalto Palace. And more: as "the first elected civilian president born in Pernambuco, the first without a university degree, and the first affiliated with a left-wing party".<sup>32</sup> There is also mention of crucial government programs, such as the Bolsa Família [Family Allowance], the Universidade para Todos [University for All] (Prouni), and the Programa de Aceleração do Crescimento [Growth Acceleration Program] (PAC), as well

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vida-de-lula. Access on: 1 May 2023. The discussions in this and the following three paragraphs are based on this page and its subdivisions.

32 Freely translated: "o primeiro presidente civil eleito nascido em Pernambuco, o primeiro sem diploma universitário e o primeiro filiado a um partido de esquerda".

as some political and legal problems faced by the government and the Partido dos Trabalhadores during the “Mensalão” scandal. Regarding the end of Lula’s second administration, the text draws attention to two aspects: the record-breaking popularity obtained by the government in the last Ibope poll (87% approval) and the unprecedented inauguration of Dilma Rousseff as president: “On January 1, 2011, the first worker to occupy the main hall of the Planalto Palace would pass the green-yellow sash to Brazil’s first female president”.<sup>33</sup>

In the account of the years following his presidency, Lula is presented as a statesman whose primary agenda is to stimulate and develop “a worldwide exchange of ideas and initiatives, with a special focus on Africa and Latin America”.<sup>34</sup> The Lula Institute has promoted, alongside like-minded associations, events on topics of global interest, such as the conference *Fórum pelo progresso social: O crescimento para sair da crise* [Forum for Social Progress: Growth to Escape the Crisis], co-organized with the Fondation Jean-Jaurès in Paris (December 2012), or the meeting *Novas abordagens unificadas para erradicar a fome na África* [New Unified Approaches to Eradicate Hunger in Africa], promoted in cooperation with the African Union Commission (AUC) and the Food and Agriculture Organization of the United Nations (FAO) in Addis Ababa, Ethiopia (June 2013). Finally, the text presents a brief note on Lula’s 2013 Latin American journey. There is, therefore, no mention of his trials, imprisonment, release from jail, or candidacy for the presidency of the Republic in 2022.

As observed, we are dealing with two distinct communication strategies concerning the trajectory of their patrons. In the FMS, we have an account in a minor tone – informative, discreet, far from propaganda and lavish praise –, seeking to present Soares as a fundamental man in Portugal’s historic journey from dictatorship to a democratic

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33 Freely translated: “No dia 1º de janeiro de 2011, o primeiro operário a ocupar a sala principal do Palácio do Planalto passaria a faixa verde-amarela para a primeira presidenta do Brasil”.

34 Freely translated: “um intercâmbio mundial de ideias e iniciativas com foco especialmente na África e na América Latina”.

and stable European regime. The focus is on the character's historical importance, as well as on recovering his memory and his achievements. Hence, the organization's management converged in keeping and disseminating documents about the patron and his socialist and republican political family. The *Casa Comum* project can also be seen in this light.

As for the IL, we have what could be called an intervention narrative, more clearly focused on the here and now. The language is thus more open, loose, and explicitly aimed at nurturing the mythology surrounding the patron. There is no shortage of adjectives, the terms are strong, and the character has been overcoming obstacles and producing unprecedented work. The tone is major – personalistic, accentuated, heroic. Thus, we have a memorial entity that operates with its eyes more on the present/future actions than on recovering a certain past.

The projects seen as strategic by both organizations are also relevant areas for analysis. In recent years, particularly after the death of its patron and the consequent change of management, the FMS has sought to find new ways not only to maintain but expand the scope of its activities. To this end, it is worth mentioning two strategic measures that could help reposition the entity for the coming decades. The first one, adopted in 2020, was the approval of a name change for the entity, which is now called Fundação Mário Soares e Maria Barroso. This initiative is filled with meaning: it pays homage to Mario Soares' wife, an activist and nationally renowned actress; it signals the Foundation's commitment to the female question and to expanding the presence of women in the memories it builds; finally, it demonstrates the FMS's directors' interest in expanding interactions with the cultural world. In other words, the organization must increasingly operate in two key areas: the preservation and dissemination of the historical memory and cultural heritage of contemporary Portugal.<sup>35</sup>

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35 FUNDAÇÃO MÁRIO SOARES E MARIA BARROSO. *Relatório de atividades e contas*, 2020, p. 4. Available at: [https://fmsoaresbarroso.pt/fundacao/lei24/docs/2020\\_relatorio\\_e\\_contas.pdf](https://fmsoaresbarroso.pt/fundacao/lei24/docs/2020_relatorio_e_contas.pdf). Access on: 1 May 2023.

Another initiative highlighted by the organization's new management is the *Casa Comum* project. For decades, the FMS has been receiving, organizing, and making available archives of political and artistic leaders from the Portuguese-speaking world, as well as providing regular technical advice on setting up and maintaining historical memory entities that were created in the wake of the liberation processes of former Portuguese possessions in Africa. In this context, the proposal to launch and put on air the *Casa Comum* project was concocted: the creation of a portal, with its own digital address, which gathers and makes available the documentation held by the FMS that comes from various countries and organizations in the CPLP. The project aims to "provide centralized access to catalogs and other instruments for describing archival sets and collections, allowing simultaneous research of documents from different sources and enhancing the discovery of complementarities and relationships between them".<sup>36</sup> According to 2020 data, the project brings together more than 1,600,000 pages, including texts, photographs, and videos.<sup>37</sup>

The *Casa Comum* platform provides researchers with multiple ways of accessing documentation, including three research guides on cross-cutting themes: *Mário Soares e a Europa* [*Mário Soares and Europe*], *Partido Comunista Português* [*Portuguese Communist Party*], *O Movimento Estudantil da oposição ao Estado Novo* [*The Student Movement in opposition to the Estado Novo*]. The three guides have the same format: information on the portal topic content, ways to access it, and a list of archives that guide research. The platform also has a page directing users to all partner organizations, such as the Arquivo e Museu da Resistência Timorense [Archives and Museum of East Timorese Resistance]; the Arquivo Histórico de São Tomé e Príncipe [Historical

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36 PROJETO. In: *Casa Comum*. Available at: <http://casacomum.org/cc/projeto>. Access on: 1 May 2023. Freely translated: "dar acesso centralizado a catálogos e outros instrumentos de descrição de fundos e coleções, permitindo a pesquisa simultânea de documentos de diferentes proveniências e potenciando a descoberta de complementaridades e relações entre eles".

37 FUNDAÇÃO MÁRIO SOARES E MARIA BARROSO. *Relatório de atividades e contas*, 2020.



Archives of São Tomé and Príncipe]; the Arquivo Nacional de Cabo Verde [National Archives of Cape Verde]; the Instituto Nacional de Estudos e Pesquisas, Bissau [National Institute of Studies and Research, Bissau]; the Observatório em Comunicação, Liberdade de Expressão e Censura da Escola de Comunicação da Universidade de São Paulo [Observatory on Communication, Freedom of Expression and Censorship of the School of Communication of the University of São Paulo], etc. All this effort has been translated into significant numbers: in 2016, the platform had more than 100,000 users and more than 700,000 views.<sup>38</sup>

*Casa Comum* has thus been established as one of the foundation's most important assets since the project, firstly, can be seen as a successful example of the use of new technologies for free access to the foundation's monumental collection, and, secondly, for maintaining and even expanding the connection with memory institutions in the Lusophone world.

In the case of the IL, the focus has been on developing, running, and feeding the *Memorial da Democracia*. At first, the project was audacious: a headquarters building would be erected in the city of São Paulo, with the aim of "contributing to the recovery of the memory of our people's struggles for democracy, equality, and social justice".<sup>39</sup> To make the project feasible, the IL obtained the transfer of a plot of land from the São Paulo municipal administration to build the memorial. This transfer, however, was blocked by the Public Prosecutor's Office, and the process remains unfinished. In the meantime, the IL has decided to launch a "virtual museum", which offers digital visitors a range of texts, photos, documents, audio and film extracts about different moments in Brazilian history.

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38 FUNDAÇÃO MÁRIO SOARES. *Relatório e contas*, 2016. Available at: [https://fmsoaresbarroso.pt/fundacao/lei24/docs/2016\\_relatorio\\_e\\_contas.pdf](https://fmsoaresbarroso.pt/fundacao/lei24/docs/2016_relatorio_e_contas.pdf). Access on: 1 May 2023.

39 UM MUSEU Virtual. In: *Memorial da Democracia*. Available at: <http://www.memorialdademocracia.com.br/museu>. Access on: 1 May 2023. Freely translated: "contribuir para o resgate da memória das lutas do nosso povo pela democracia, pela igualdade e pela justiça social".

The project is the result of the work of journalists, designers, and historians. In the specific field of history, the IL has been supported by historians linked to Projeto República: Núcleo de Pesquisa, Documentação e Memória [Republic Project: Research, Documentation, and Memory Center], coordinated by Professor Heloisa Starling and based at the Departamento de História of the Universidade Federal de Minas Gerais. The main focus of the Projeto República, created in 2001, is “the Brazilian republican historical period, the history of ideas and concepts in Brazil and the study of republicanism”.<sup>40</sup> The documentary inventories and research produced by the project address six themes relating to Brazil’s contemporary history, namely: 1964 Military Coup; Information and Repression Agencies of the Dictatorship; Informants, Insiders, and Repression Agents; Censorship; Military Dictatorship and Indigenous Populations; Resistance Organizations and Movements.

As seen above, working in tandem with university segments has marked the IL’s history. For example, we recall the projects formulated within the scope of the Instituto Cidadania, covering different areas, several of which ended up serving as a foundation for public policies during President Lula’s government. The practice is now reproduced around another objective: to develop and disseminate to teachers and the general public a historical narrative based on an inclusive and strategic notion of democracy. As the project’s website states, “democracy does not fall from the sky. (...) It is essential for everyone’s voice to be heard and for the interests of the large majorities to be taken into account in society”.<sup>41</sup>

The “virtual museum” has thus been designed and nurtured by prestigious university segments that have invested in projects somehow

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40 SOBRE o Projeto República. In: *Projeto República UFMG*. Available at: <https://www.ufmg.br/brasildoc/sobre-o-projeto-republica/>. Access on: 1 May 2023. Freely translated: “o período histórico republicano brasileiro, o percurso da história das ideias e dos conceitos no Brasil e o estudo da temática do republicanismo”.

41 UM MUSEU Virtual. In: *Memorial da Democracia*. Freely translated: “a democracia não cai do céu. (...) Ela é essencial para que a voz de todos se faça ouvir e os interesses das grandes maiorias sejam levadas em conta na sociedade”.

linked to the so-called public history, i.e., history produced with and directed at audiences beyond the university walls (CARVALHO; TEIXEIRA, 2019). Heloisa Starling, in her speech at the launch ceremony for the *Memorial da Democracia* held in September 2015 at the headquarters of the Sindicato dos Metalúrgicos do ABC, tried to establish some parameters guiding the project, namely: 1) Brazilian history is not and has never been univocal: “it is dynamic and paradoxical, slavish and insurgent, cruel and generous”;<sup>42</sup> 2) the history of our country, like that of others, “is not finite, it is inconclusive and full of questions” about what is to come; it “does not have a perspective of destiny. It is made up of choices and their consequences”;<sup>43</sup> 3) Brazilians, between the 19<sup>th</sup> and 20<sup>th</sup> centuries,

undertook a long and relentless journey to guarantee our democratic construction. From the 1970s onwards – and this Union is one of the places where this happened – Brazilians bet on the idea that democracy is more than a system of government, democracy is a form of society...<sup>44</sup>

Starling thus makes explicit her distance from conceptions of history marked by teleology, easy praise, or personalism. The author advocates that the account of political history is shaped by social experience while understanding democracy not as an institutional artifact that produces and reproduces political elites, but rather as the fruit of this social experience.

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42 Freely translated: “ela é dinâmica e paradoxal, escravagista e insurgente, cruel e generosa”.

43 Freely translated: “não é finita, ela é inconclusa e cheia de perguntas”; “não tem uma perspectiva de destino. Ela é feita de escolhas e de suas consequências”.

44 See Starling’s speech: INSTITUTO Lula lança Memorial da Democracia no ABC Paulista. In: *Fundação Perseu Abramo*, 1 Sept. 2015. Available at: <https://fpabramo.org.br/tv-fpa/instituto-lula-lanca-memorial-da-democracia-no-abc-paulista/>. Access on: 1 May 2023. Freely translated: “protagonizaram uma longa e duríssima jornada para garantir a nossa construção democrática. A partir dos anos de 1970, e esse sindicato é um dos locais onde isso aconteceu, os brasileiros apostaram na ideia de que a democracia é mais do que um regime de governo, a democracia é uma forma de sociedade...”.

Lula, speaking at the same ceremony, corroborated Starling's propositions. His speech, as usual, was full of exemplary cases and stories that he and his fellow workers had experienced, whether in the Union, the PT, or political disputes. In this way, he tries to make himself understood through his personal and class testimony.

Democracy, for him, "is not easy to understand". Lula underscores how, in the early 1970s, during the military dictatorship, the economy presented high growth rates, and workers thought they were living well. As a result, he continues, they cared little about what happened outside the factories: "At that time, democracy for the workers was having a job, a salary, and living peacefully". According to Lula, this idea leads us to understand that "democracy is not something that is already given". It is something that needs to be worked on, "these are values about which we need to convince people all the time", because people "only realize its importance when it no longer exists". For him, democracy cannot be identified as a "pact of silence"; it presupposes involvement, movement, demands, and claims. Democracy, in his words, "is a society on the move in search of more rights, other rights".<sup>45</sup>

The *Memorial da Democracia*, currently still configured as a "virtual museum", is an ongoing project that has received broad support from the administration of the IL, which sees it as a crucial instrument for political education and dissemination. Further research will be able to better illuminate and situate its role in the power project led by President Lula and the PT. In any case, further inquiries should take into account the capacity that the PT's hegemonic camp has had in creating and maintaining a complex of entities that operate in an integrated way in the construction of public policies (Instituto Cidadania/Instituto

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45 See Lula's speech: INSTITUTO Lula lança Memorial da Democracia no ABC Paulista. In: *Fundação Perseu Abramo*, 1 Sept. 2015. Freely translated: "não é algo fácil de se compreender"; "Naquele instante, a democracia para os trabalhadores era ter um emprego, um salário e viver tranquilamente"; "a democracia não é uma coisa que já está dada"; "são valores que a gente precisa convencer as pessoas todo o dia"; "só se dão conta da sua importância quando ela já não existe mais"; "pacto de silêncio"; "é a sociedade em movimentação à procura de conquistar mais direitos, outros direitos".

Lula), the debate and dissemination of issues aimed more directly at feeding the PT and allied parties – an activity led by the Fundação Perseu Abramo – and, finally, the elaboration and propagation of a historical narrative committed to the slogan that “democracy is the work of Brazilian society”.

## **FINAL REMARKS**

We will conclude this essay with three brief comments that could serve as a basis for further work. Firstly, when studying these memorial centers, we need to consider the phenomenon mentioned here, which we could preliminarily call the “extended presidency”, i.e., we need to ponder that there are political-symbolic presidential attributions related to the Head of State, which go beyond the regular exercise of the mandate. Hence, the recognition by the political-legal system and society of entities formed to guard, nurture, and propagate the memory of their patrons/presidents. This is a long-standing and widespread experience throughout the world, and here we have focused on two examples that are significant in the Portuguese-Brazilian universe: the creation of the Fundação Mário Soares, now known as the Fundação Mário Soares e Maria Barroso, and the Instituto Lula.

Secondly, these two presidential centers created to administer the legacies of Mário Soares and Lula have also fulfilled the function of providing symbolic and institutional support for the public – and political – activities of their patrons, whether in the sense of guaranteeing them a space removed from domestic political disputes or as a platform in international forums. Organized as civil, public utility, and non-profit entities, these centers have so far proved to be operational in dealing with a multifaceted agenda, which involves responsibilities around the custodianship of the patrons’ documents, the promotion of cultural activities in collaboration with universities, and the articulation of different groups to subsidize policies on various themes. The FMS and the IL have built up this multiple institutional profile, although with numerous difficulties in recent years.

Thirdly, in this research, which is still ongoing, we have focused our analysis on two memorial centers and mentioned four more. We, therefore, have a significant sample, allowing us to present a preliminary typology based on two criteria: institutional profile and how they have operated in the public spaces of their respective countries. One of these entities, the Fundación Comandante Eterno Hugo Chávez [Eternal Commander Hugo Chávez Foundation], is responsible for the mausoleum in honor of its patron. In other words, its primary function is to revere the figure of the national hero, the revolutionary president. Alongside it, another equally official organization was created, responsible for disseminating Chávez's ideals and legacy, the Instituto de Altos Estudios del Pensamiento Político de Hugo Chávez [Institute of High Studies of Hugo Chávez's Political Thought].

The museum-libraries of the American presidents represent another type of organization and are fundamental entities for US historical research. Built by former presidents with private funds and managed under public supervision, they fulfill the civic, political, and ceremonial role of celebrating and exalting the entity of the presidency of the Republic – which has long been fundamental in the political-symbolic order of the United States.

Finally, we have a new model of presidential center formed and led directly by the former president, in a fairly autonomous way, whose purpose is to gather political and financial conditions to publicize – and not exactly worship or celebrate – the name and work of its patron.<sup>46</sup> This is the prevalent format of the Fundação Mário Soares e Maria Barroso, the Fundação Fernando Henrique Cardoso, the Instituto Patria,

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46 We believe that, when examining and classifying these memorial centers, we should also make further advances to analyze the regimes of historicity that may shape these entities, i.e., we should focus on how they operate and promote the articulation between past-present and future (HARTOG, 2013). In a preliminary approach, yet to be tested in new research on the subject, we would have, on the one hand, those entities that elaborate and disseminate narratives about patrons based on a heroic, circular, exemplary time, such as monument centers and American museum-libraries. On the other hand, the “multifaceted” presidential centers operate in a modern, procedural, futuristic time frame. Patrons are, therefore, conceived and displayed as historical agents who can build bridges between yesterday, today, and tomorrow.

and the Instituto Lula, each in its own manner, in the image and likeness of its patron. As we have seen, the FMS has established itself as an essential documentary center for contemporary Portugal and the liberation struggles in the Portuguese world. It should therefore strengthen its image as a center for debate on current issues.

After leaving government, former President Fernando Henrique Cardoso no longer ran for political office and has dedicated himself to publishing his diaries, memoirs, and political essays while remaining at the head of the organization that bears his name. Inaugurated in 2004, the then Instituto Fernando Henrique Cardoso [Fernando Henrique Cardoso Institute], now transformed into a foundation, has been operating as a multifaceted center, according to the terms already mentioned. The FFHC has excelled in keeping documents on the patron and his family, besides holding various events to discuss contemporary political and social issues. As part of the foundation's activities, it is worth highlighting the coordination, alongside the Centro Edelstein de Pesquisas Sociais [Edelstein Center for Social Research], of the *Plataforma Democrática* [Democratic Platform] project, a wide-ranging portal that brings together publications, a video library, and links to virtual libraries on democracy and the information society. The project aims to strengthen democratic culture and institutions in Brazil and Latin America.<sup>47</sup> The organization was recently ranked by Professor James McGann's team as one of the most important think tanks in South America, alongside other Brazilian institutions such as the Fundação Getúlio Vargas [Getúlio Vargas Foundation] (FGV), the Instituto de Pesquisa Econômica Aplicada [Institute for Applied Economic Research] (IPEA), the Centro Brasileiro de Análise e Planejamento [Brazilian Center for Analysis and Planning] (CEBRAP), etc.<sup>48</sup>

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47 See: QUEM somos. In: *Plataforma Democrática*. Available at: <https://www.plataformademocratica.org/quem-somos>. Access on: 1 May 2023.

48 See: MCGANN, James G.. 2018 Global Go To Think Tank Index Report. In: *Scholarly Commons – Penn Libraries*. Available at: <https://repository.upenn.edu/handle/20.500.14332/48575>. Access on: 1 May 2023. See the discussion of the concept of think tank and its applicability to Brazilian institutions in Hauck (2015).

Cristina Kirchner and Luiz Inácio Lula da Silva, after ending their terms in office in the 2010s, created their own civil entities to publicize their names and governments. This attitude, however, did not cause them to withdraw from day-to-day politics, as was the case with several US presidents and Fernando Henrique Cardoso himself. We believe that some constitutive aspects of the Instituto Patria and Instituto Lula should be examined in this context.

The Instituto Patria, founded in 2016, is defined “as a plural space for reflection and construction of thought for action”<sup>49</sup> and has three clear lines of action: a space for broadcasting the public activities of the entity’s honorary president; encouraging the recruitment of Peronist militants and cadres identified with Kirchner’s leadership; and promoting training courses on political, economic, and social issues. Unlike other centers studied here, there is no further information on Kirchner’s life, governments, and private or presidential archives. What we do have, in profusion, are images of the leader at work in the here and now. So far, the organization’s focus, therefore, has been on nurturing the political leadership of Argentina’s current vice president.

The Instituto Lula, as mentioned, is going through a transitional phase marked by the shifting of names in the organization’s management and the resumption of the patron’s political activities. Like the Instituto Patria, the IL now focuses on training courses and projects that help establish the patron’s and the Institute’s image as committed to building democracy in the country.<sup>50</sup>

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49 EL INSTITUTO. In: *Instituto Patria*. Available at: <https://www.institutopatria.com.ar/actividades-estrategicas/>. Access on: 1 May 2023. Freely translated: “como un espacio plural para la reflexión y la construcción de pensamiento para la acción”.

50 A visit to the IL website in April 2023 showed that, so far, Lula’s election to the presidency in October 2022 has not led to any significant changes in the organization’s direction or activities. The only noteworthy novelty is the discreet publication of the new government’s acts. The emphasis remains on training courses and updating the *Memorial da Democracia* project.



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