


RESEARCH ARTICLE

# The Spanish *Monte Pío Militar*: Institutional protection for the widows and other relatives of naval officers, 1730–1900

Pablo Ortega-del-Cerro 

Email: [pablo.ortega1@um.es](mailto:pablo.ortega1@um.es)

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## ABSTRACT

This work examines the creation and development of the *Monte Pío Militar*, a permanent public pension system that was established for the widows and other relatives of deceased naval officers who had been in the Spanish Navy. This system was not a mutualist experiment, but rather constitutes an innovative example of an institutional protective organization that was based on objective principles and supported by an impersonal agent: the state. The article is divided into three parts. The first section studies the formal organization of the *Monte Pío Militar* between 1761, when the system was instituted, and 1900, when the welfare state truly began to take shape in Spain. The second part focuses on the rudimentary protection system that the navy had operated during the previous period (c. 1730–61) and the first steps of the *Monte Pío Militar* (1761–1800); this section is particularly interesting, for it examines how the previous system was superseded by new measures, criteria, and values. The third part examines both how the pension system was applied and its impact on the families that benefited from it during the nineteenth century. This will illustrate how the families soon internalized the idea that pensions were a reflection of the state's duty to protect them, while the legal principles behind the system and the bureaucratic protocol built around it were progressively consolidated.

## Introduction

In 1761, the Spanish Monarchy created the *Monte Pío Militar*, “whose laudable aims were directed to improve, as far as possible, the precarious situation in which the families of military officers remained after the officer's death” (Cañizares Ruiz 1902: 2). Because of the nature of military life, the death of officers often led to their families being left helpless and destitute, and the Crown decided to establish a system of benefits and pensions for those who had depended on the dead officer's salary. This work focuses on the origin and development of the Spanish *Monte Pío Militar* and, especially, the implementation of the associated pension system by

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the navy. The aim of this article is to highlight that this model, which was originally limited to the families of military officers – from both the army and navy, was an innovative welfare mechanism that received the direct support of the monarchy and the state (Calle Velasco 1997; Capellán de Miguel 2004; Cabrera 2014; García González 2008; Guillén 1990). Although a rudimentary protection system existed for military officers and their families during the seventeenth and the first half of the eighteenth centuries, which has to date not been studied in detail, the creation of the *Monte Pío Militar* in 1761 was an important change. King Charles III (1759–88) created the institution to protect the families of dead officers, and decreed that the whole cost of the scheme was warranted by the monarchy. This means that the death of a naval officer – provided that he was undertaking active service and met certain requirements – was automatically entitled to the state's protection toward his widow or relatives in the form of a pension, which was calculated on the basis of his wages.

The term *Monte Pío* originated from the Italian concept *monte di pietà*. This system was created by the Franciscan order in the late fifteenth century, as a charity organization that allowed the poor to pawn their belongings for money without interest, which would be used to meet their basic needs. This primitive model of *montepío*, which may be considered as a charitable fund because it did not involve a guaranteed income and was not contribution based, was different to the *Monte Pío Militar*. This institution, conversely, cannot be considered a friendly society because, even though its members enjoyed formal rights, according to their contributions, it was not organized according to the principles of mutual associations. Therefore, although it was neither just for naval officers (Chandler 1991) nor, strictly speaking, an eighteenth-century innovation (Ponce Ramos 1995; Sola Ayape 1999; Tormo Camallonga 2002; Torremocha Hernández 2011), the *Monte Pío Militar* created in 1761 was an innovative system for three reasons. First, it was not a measure taken against poverty per se, but one instituted to mitigate the vulnerability of officer's families after their death, that is the normative referred that the objective of the institution was not preventing poverty but trying to solve helplessness that was generated after officer's death; second, this system operated using a complex and comprehensive administrative system and state-supported political organization and institutional economy; and, third, the system survived until the twentieth century, when it was eventually replaced by the modern welfare state (Pons and Silvestre Rodríguez 2010).

The emergence of the *Monte Pío* should be contextualized within a vast and profound process of the professionalization of Spanish military institutions in the aftermath of the Bourbon victory in the War of the Spanish Succession (1700–14). The army was reorganized according to the French model, and the navy was fully renovated and its organization was centralized. This led to greater control over the officer corps, not only in professional terms but also in relation to their personal affairs, such as marriage – they had to apply for a royal license to wed. In addition to this, in the eighteenth century the navy began to assume responsibility for the care, protection, and welfare of officers' families, especially in cases of acute need. The monarchy was keenly aware of the risks and danger associated with a naval career, and the consequences that these could have for the officers' families. The most tragic scenario saw the deaths of officers leaving widows and other relatives – especially children – vulnerable in the absence of the head of the

household. The *Monte Pío* was created to provide for just this kind of situation (García de la Rasilla Ortega 1987; Herráiz de Miota 2003, 2005; Newton 1987).

Owing to its nature, philosophy, and organization, and especially to the idea of public protection as an acquired right, the *Monte Pío Militar* is an interesting forerunner of institutional support (Beito 2000; Flora and Heidenheimer 1990; Mishra 1990; Pedersen 1995; Smith 2003; Thane 1996), at least in Spain, where these pensions are a crucial precedent of modern public care system (Baldwin 1990; Chatriot 2009; Finlayson 1994; Fraser 2009; Harris 2004; Kuhnle and Sauder 2010; Melling 1992; Trattner 1999).<sup>1</sup> The main aim of *Monte Pío* was to protect individuals thrown into a sudden position of vulnerability and that were based on objective criteria and a principle of equity – giving everyone their due according to the social norm. Thus, the objective of this article is to study the creation and development of this institution in the eighteenth and nineteenth centuries, and to examine its innovative features. To do this, three aspects will be examined in detail here: the regulations that governed the system between 1761 and 1900; the differences between the innovative *Monte Pío Militar* and the previous and more rudimentary model – in operation prior to 1761, and the development and reception of the system among the families of naval officers during the nineteenth century.

The granting of pensions to the widows of officers was a common practice among other European armies and navies during the Early Modern Age, but they were rudimentarily and haphazardly organized (Ailes 2009; Ghosh 2003; Hudson 1994; Lomas 2000). For comparison purposes, one can briefly illustrate the English case. Between 1695 and the 1810s, the Chatham Chest fund paid a certain number of pensions to the widows of naval officers, although the system had been originally created to pay retirement pensions. This organization was conceived as a charity and a mutual protection system, funded by salary-based contributions – between 0.03 percent and 0.05 percent of the salary – however, its financial performance was irregular, which led the government to cover shortfalls from the early eighteenth century onward (Lewin 2003). However, in 1763, the Greenwich Hospital started providing money handouts, which in this case were not restricted to widows. In parallel, between 1695 and 1822, the Royal Bounty fund provided some support – usually a year’s wages – to naval officers’ widows and children, but only in exceptional circumstances.

In any case, the most important measure was promulgated in 1732, with the creation of “His Majesty’s Commission for the Establishment for Relief of Poor Widows of Commission and Warrant Officers of the Royal Navy,” which was an official pension fund. The nature of this fund was mixed, as it was endowed with government grants while also collecting salary-based contributions. The main purpose of the institution was to provide for the systematic protection of poor widows, but only took care of the wives of officers who had died in active service.

<sup>1</sup>“In Spain, the pension system was created as early as 1761, when the Monte Pío Militar was established” (Cañizares Ruiz 1902: 2). This statement is also supported by Rumeu de Armas (1944). It is worth highlighting how closely the Monte Pío Militar matches Briggs’ definition of the welfare state, especially “by narrowing the extent of insecurity by enabling individuals and families to meet certain ‘social contingencies’ (for example, sickness, old age and unemployment)” (Briggs 1961: 235).

During the nineteenth century, there were some interesting changes,<sup>2</sup> for instance, in 1814, the Chatham Chest fund and Greenwich Hospital merged and in 1830, changes were introduced to the regulations to provide cover for officer's widows who were excluded from the pension system. In 1836, the admiralty took over responsibility for all the widows' pensions, and new regulations were enacted in the 1860s; although it was decreed that pensions for widows "cannot be claimed as a right; they are granted as a reward for the good and faithful service rendered by deceased officers . . . the ordinary pension will not be granted to widows left in wealthy circumstances" (British Navy Regulation 1862: 349).

### Normative and Institutional Development (1761–1900)

Although plans to constitute a specific institution to care for the widows and relatives of dead officers existed as early as the 1750s (Archivo General de Simancas [AGS] 62), the Spanish *Monte Pío Militar* was not officially founded until 1761 (MPM Constitution 1761). It was one of the first projects of Charles III, also King of Naples (1734–59), upon taking the Spanish throne in 1759. He had experience with this sort of institution, having founded a *montepío* for army officers in Naples in 1753 (MPM Constitution, 1753). Charles III's actions may be analyzed from different perspectives, but the reasons that led to the foundation of the institution seem clear: the first and most obvious motivation was to provide some degree of protection to officers' widows and families after their death; second, this pension system can be interpreted as one step in the process of professionalization undergone by the military corps in Spain and other European monarchies in the eighteenth century (Elias 2007; Ortega-del-Cerro 2016; Tietler 1977); finally, the foundation of the *Monte Pío* should be examined within the context of the progressive accumulation of power by the Spanish Crown. As part of this process, the king was trying to staff its reformist policies with members of the middle and lower strata of the nobility (Imízcoz Beunza 2007; Morales Moya 1987). This last factor was important for both the army and the navy; most of the officers embarking on military careers came from the lower and the middle echelons of the nobility, and the monarchy ensured that they were generously rewarded for their service, which allowed the Crown to control the lives of its officers, both professionally and personally.

We have always considered that one of the most worthy objects of our Royal commiseration is the helplessness in which many widows of military officers remain after losing their husbands in the glorious race of arms; we have tried to exercise our Royal Mercy in favour of widows who were in greatest peril. . . . Following these principles and always thinking of the greatest relief of the military widows, to redeem them from all want derived from the loss of their husbands . . . , and also thinking about officers, so they can marry as becomes the honour and decorum of the militia, and the proportionate and decent pensions arranged for their widows . . . not only to guarantee their subsistence,

<sup>2</sup>For the United States see Clark, Craig, and Wilson (1999a, 1999b) although these studies largely focus on the privatization of the pension system.

but also so that they can attend to their obligation to raise and educate their children until they reach the age to come in our royal service or marry. (MPM Constitution 1761: 5)

These pensions could be enjoyed by one of three beneficiaries: the officer's widow, the officer's children – if the wife and mother of the children was dead, or the officer's mother, provided that she was a widow. Most of the beneficiaries were widows (for a European comparison, Cavallo and Warner 1999; Moring and Wall 2017; for Spain, García González 2016) but to qualify for the pension officers had to meet a number of conditions. First and foremost, they needed a royal license to marry, and this was regulated by a specific ordinance issued in 1760 (Military Marriage Ordinance 1788 [1760]). Only army captains – and their navy equivalents, *tenientes de navío* – could apply for this royal license; noble women were made to deposit a dowry of 20,000 *reales* – 50,000 *reales* in the case of plebeian women because they had to demonstrate respectable origins, whereas officers' daughters were exempt from this financial obligation. This is important: for officers who lacked this license or who had married before they acquired the required rank were automatically excluded from the pension system.<sup>3</sup> The application consisted of a memorandum in which the officer's fiancée's social status was described, including such details as her family and lineage, nobility and respectability (Andújar Castillo 1991; Capel Sáez 1988; Díaz Muñiz 1969a, 1969b; Marchena Fernández 1992; O'Byrne Hoyos 2010).<sup>4</sup>

Pension applications were a simple affair, essentially involving a memorandum attesting the death of the officer and claiming the pension (AGMAB 483-1), alongside documents aimed at demonstrating the officer's rank as well as marriage certificates, certificates proving that his children were legitimate, and, if the applicant was the mother of the officer, birth certificates (MPM Regulation 1767, 1777). To receive the pensions, widows had to meet some conditions: they could not marry again, and they were obliged to look after and educate their children. In a way, these obligations constituted a contract between the women and the monarchy; they played a key role in royal service – a public service that made them deserving of the pension. In the absence of the mother, officers' children were paid the pension until they had a job, in the case of sons, or until they married, in the case of daughters. It was common for officers' daughters to remain single and thus receive the pension until their death (MPM Regulation 1769a). If the officer was not married and had no children, the pension could be enjoyed by his widower mother but the accumulation of two or more pensions was categorically forbidden, that is a mother who lost two unmarried sons could only receive one set of benefits (MPM Regulation 1769b).

From an administrative perspective, the *Monte Pío* was a complex organization, for it was subordinated to the army and the navy but, at the same time, had some degree of autonomy. Management duties chiefly fell to the board – *Junta* – and

<sup>3</sup>The regulations of 1761 and 1796 established this requirement for officers who had married after the publication of these regulations. All the officers married before 1761 with a royal license were incorporated into *Monte Pío Militar*.

<sup>4</sup>Officers' daughters and noblewomen were preferred, but marrying plebeians was not forbidden; however, the norms in this case established that the fiancée must come from a prestigious and honorable family, that is the family had to be pure of blood and not tainted by their professional activity.

treasury – *Caja* – of the *Monte Pío Militar*. Pensions were administered and applications processed by the Council of War – *Consejo de Guerra* – with the aid of the respective Secretaries of State – *Secretaría de Estado y del Despacho de Guerra* for army officers and the *Secretaría de Estado y del Despacho de Marina* for navy officers. This first regulation established two kinds of funds: on the one hand, a permanent fund, which was provided directly by the Crown – 6,000 doubloons from the Royal Treasury and 20 percent of various ecclesiastical rents that were controlled by the monarchy, and on the other hand, the ordinary contributions by member officers. With every promotion, the officer had to make a one-off payment that amounted to the difference between his previous and his new wage. In addition, the organization extracted 8 *maravedís* per *escudo de vellón* from the officers' ordinary salary – that is, 2.35 percent of the common wages they earned without taking into account salary supplements due to special commissions (MPM Regulation 1767). However, the most relevant point is that the Crown covered the shortfall if the funds available were insufficient.

The amount paid depended on the rank of the officer at the time of death and the 1761 regulations established the following sums: admiral's widow, 18,000 *reales* per year; vice-admiral's widow, 12,000 *reales*; rear admiral's widow, 10,000 *reales*; commodore's widow, 8,000 *reales*; captain's widow, 6,000 *reales*; for the rest of ranks, the pension amounted to half the ordinary wage – see Table 1. After the system was established, the number of beneficiaries grew exponentially. According to García de la Rasilla (1987, 142), whereas in 1763 the number of pensions paid by the *Monte Pío Militar* was barely 100, by 1799 this number had soared to 2,250. Although García de la Rasilla's data is frankly confusing – for instance, the author does not explain whether this number refers only to the army – it seems clear that the system expanded substantially in the army as well as in the navy.<sup>5</sup> In addition, in extraordinary circumstances, especially in time of war, the king could award a *Monte Pío Militar*-administered pension; for instance, in 1780, when the ship *Santo Domingo* exploded, the families of the dead officers were granted a pension (Archivo General de la Marina Álvaro de Bazán [AGMAB] 5248). In any case, in the 1770s, the funds allocated in the regulation of 1761 proved insufficient and the amount paid for each pension was very high.

These mounting difficulties led to the publication of a new constitution for the *Monte Pío Militar* in 1796 (MPM Constitution 1796). These regulations, which were not replaced by the navy until 1926, attempted to tackle some of the shortcomings of the original constitution and, in general, to improve the system. The new norms were precise and accurate, resulting in a balanced, efficient, and objective public protection system. The introduction of the 1796 constitution is illustrative in this regard:

The pitiful state of indigence often suffered by widows of military officers, despite the generous allocations made by the Treasury in the days of my

<sup>5</sup>The institution was originally created for military officers, but other groups within the navy also enjoyed the protection of their specific *Monte Píos* – the naval artillery corps, the pilots, armory officers, and doctors had their own pension system – although most of them were suppressed in the 1810s. Between 1763 and 1790, other royal institutions created their own *montepío*, such as the courts, the tax office and the treasury, the overseas offices, the post office, and other public bodies (Santos 2017; Sobrevilla Perea 2016).

**Table 1.** *Pensions of the Monte Pío Militar and officers' wages*

Naval ranks	Pensions 1761 (reales)	% Deduction (1761)	Wages 1787 (reales)	% Deduction (from 1796)	Pensions 1796 (reales)	Wages 1828 (reales)	% Deduction (from 1828)	Pensions 1847 (reales)	% Deduction (from 1857)	Pensions before 1860 (reales)	Wages 1860 (reales)	Pensions after 1860 (reales)
<i>Capitán general</i>	18,000	2.35%	120,000	2.9%	15,000	120,000	10%	15,000	0%	18,000	120,000	20,000
<i>Teniente general</i>	12,000	2.35%	43,800	2.9%	10,000	45,000	10%	10,000	0%	14,000	45,000	18,000
<i>Jefe de escuadra</i>	10,000	2.35%	30,000	2.9%	8,250	30,000	10%	8,250	0%	10,000	30,000	14,000
<i>Brigadier</i>	-	2.35%	24,000	-	6,600	24,000	10%	6,600	0%	9,490	24,000	10,950
<i>Capitán de navío</i>	4,000	2.35%	18,000	2.9%	5,000	18,000	10%	6,000	0%	6,570	24,000	9,490
<i>Capitán de fragata</i>	2,760	2.35%	12,000	2.9%	4,500	12,000	10%	4,200	0%	5,110	18,000	7,300
<i>Teniente de navío</i>	1,880	2.35%	6,600	2.9%	2,500	6,600	6%	2,400	0%	3,285	12,000	6,570
<i>Teniente de fragata</i>	1,500	-	4,800	-	2,500	4,800	6%	1,880		Abolished rank		
<i>Alférez de navío</i>	1,200	-	3,600	-	1,880	3,600	3%	1,500	0%	2,555	6,600	3,285
<i>Alférez de fragata</i>	1,100	-	3,000	-	1,600	3,000	3%	1,200		Abolished rank		

Source: Cañizares Ruiz 1902; Costo Pache 1887; Lazcanotegui 1847; Military Wages Compendium, 1787; MPM Constitution 1761, 1796.

predecessors, prompted my august father to provide a remedy, creating for this purpose a mountain of mercy . . . . Although wise regulations were then put into place in order to balance available funds and obligations . . . . So that work so pious and dignified would not come to an end . . . . I have arranged to issue new regulations to simplify the management, governance and collection, and to distribute pensions according to clear and strict rules. (MPM Constitution 1796: 1–4)

Although the structure of the institution remained the same, important changes had to be introduced to ensure the sustainability of the system. The most relevant transformations were as follows: the requirements to access the *Monte Pío Militar* were outlined in greater detail, the amount paid to each pensioner decreased, and the funds were restructured. The main, and most urgent, problem for the institution at the end of the century was the need to obtain more resources and above all to make them more regular. For that reason, from 1796 onward, the king endowed the treasury of the *Monte Pío Militar* with 6,000 doubloons per year, as well as with a significant number of ecclesiastical rents, chiefly collected in America.<sup>6</sup> This was in addition to the ordinary salary-based contributions from members, which were now raised: on being admitted to the *Monte Pío Militar*, officers had to hand over their whole first salary; after promotions, they had to make a payment that amounted to the difference between the new and the old wage; finally, the organization kept between 10 *maravedís* per each *escudo de vellón* out of the ordinary wages and 10 *maravedís* out of the extraordinary wages – that is, 2.9 percent of salaries. The beneficiaries were still widows – the most numerous group, orphans, and widowed mothers; only officers who married with the rank of captain – *teniente de navío* in the navy – or above, and always with a royal license,<sup>7</sup> and the families of officers who died during wartime – in this case, officers of all ranks – were included. The final major change introduced by the 1796 constitution was the reduction of the amount paid to each pensioner; for instance, admiral's widows received 15,000 *reales* per year; vice-admiral's widow, 10,000 *reales*; rear admiral's widow, 8,250 *reales*; brigadier's widow, 6,600 *reales*; commodore's widow, 6,000 *reales*; captain's widow, 4,200 *reales*. As shown on Table 1, the amount of the pensions fell in 1796, although they increased again throughout the nineteenth century.

It is important to emphasize that the 1796 text regulated the pension system with more precision and remained in force until the early twentieth century. Indeed, some legal documents even made jokes about this fact: in 1915, the legal compilation of the navy stated that “the regulations are dated to 1796 and are still in force today – such a rare eventuality, given the generally unstable nature of our legislation” (“Pensiones” 1915: 620). However, some relevant alterations were introduced in the nineteenth century. During the first half of the century – especially during the Peninsular War and the 1820s – the finances of the *Monte Pío Militar* were

<sup>6</sup>The fixed endowments included 20 percent of the proceedings of *Expolios* and *Vacantes* of the *Mithras* of the Kingdoms of Mallorca, Ceuta, and Canarias; as a perpetual endowment, the entire proceedings of the *Anantas Ecclesiastical Half of the Indies* since 1775; and, one-third of the proceedings from major and minor ecclesiastical vacancies of the Indies, after the deduction of their legitimate charges.

<sup>7</sup>The new regulation abolished bride's dowries provided that the marriage occurred when the officer was ranked as captain or above. If the officer had a lower rank, the groom had to contribute with 60,000 *reales* and the bride with 20,000 *reales* – 50,000 if she was a plebeian.



disastrous (AGMAB 5249). The problem was the same throughout the period: the institution's resources were limited and fluctuated tremendously, which led to delays in the payment of the pension in the 1810s, 1820s, and 1830s. Often, changes were proposed, but it always proved impossible to carry them out. For instance, in 1813, a decree was enacted to forbid any alterations being made on the funds of the *Monte Pío Militar*, although this norm was in the event not applied. This crisis was very real, but this does not mean that the system failed; on the contrary, this context was a chance to perfect the pension management protocols and criteria, which in the long run became more reliable. This critical situation led to the adoption of extreme measures: from 1828 onward the deductions from officers' salaries rose: by 10 percent from *Capitán General* to *capitán de fragata*, by 6 percent for *tenientes de navío*, and by 3 percent for *alférezes de navío*. These contributions were not only used to fund *Monte Pío* pensions but also retirement pensions – these were regulated by a new law, and did not exist during the eighteenth and the first quarter of the nineteenth centuries (Biblioteca del Museo Naval, Impresos, 20 (10) and (11)).

In 1834, the treasury of the *Monte Pío Militar* was abolished and the public revenue absorbed its resources; from that date onward, payments were carried out by the Ministry of Finance (AGMAB 5251), and from 1835, pensions featured in the national budget, which means that the state committed to shoulder the associated expenses. However, the economic situation began to improve in the 1830s and 1840s, and the contributions sufficed to cover all pensions.<sup>8</sup> During the 1840s, the pensioners in the roll of the *Monte Pío* began to be called *clases pasivas* – alongside all recipients of state pensions who were dependent on some state employee – and many attempts were made to regulate this figure with precision. In the event, the enactment of specific laws proved too difficult until a much later date – the Statute for the *Clases Pasivas* was definitively enacted in 1926 (Gaceta de Madrid, 1925). In contrast, in 1857, salary contributions were abolished, which means that all the expenses of the pensions were assumed directly and solely by the state, through taxation (Gaceta de Madrid, 1857). The reasons that led to this change were the growing price of basic products and the desirability of homogenizing all state pensions that were not based on a contribution system – for instance, the pensions paid to civil servants were not based on deductions from wages. In this year, the *Monte Pío Militar* was formally dismantled, as the organization was incorporated into the general public administration system. After 1857, therefore, the *Monte Pío Militar* did not exist formally – the original organization had been disbanded – but it was fully operational because the 1796 regulations were still in force and the pensions were flowing without interruption, that is, the system witnessed overlapping institutions and jurisdictions, but the obligation assumed by the state remained unchanged (Bozzo del Espino 1899; Cañizares Ruiz 1902; Costo Pache 1887).

### Antecedents and Early Steps of the *Monte Pío Militar* in the Navy

Prior to the constitution of the *Monte Pío Militar* (1761), a rudimentary system existed to protect the families of army and naval officers whose situation was especially precarious. The system was, in fact, a charity, an extraordinary royal grant that

<sup>8</sup>According to Lazcanotegui (1847: 15), in 1845 there was a surplus of 6,293,972 reales: the expenses were 15,684,000 reales and the incomes were 21,977,972 reales.

aimed to mitigate the most serious cases of neglect. The most common expressions in the record are “pension” – *pension* – and “handout” – *limosna*, the origins of which predate the eighteenth century. The earliest recorded example of this kind of charitable action dates from 1731 and was found in the records of the secretary of state for the navy. The file includes a request for a relief “handout” to be made in favor of Feliciana Pineda, widow of Lieutenant Pedros Despois. The secretary decided in favor of the request following a note made by the navy’s general quartermaster: “the widows of several officers of the same rank have received a pension [and] . . . given the concurring circumstances it seems reasonable to grant it”: Feliciana’s husband had died commanding a pack boat off the coast of America (AGS 69). This case suggests that prior to 1730 a greater number of widows were applying for pensions and handouts, but also that there was no regular system in place. Instead, the relief provided was unsystematic and haphazard, and largely depended on royal grace.

The secretary for the navy granted pensions or alms largely based on the needs of the officers’ families and the navy wanted to prevent widows having to beg after their husband’s death, which is why the applications describing dramatic conditions of helplessness were more successful. For instance, in 1760, Antonia Montanaro, widow of Captain Manuel Bustamante, claimed that “I am alone with three small children, and in the greatest need; it would be even more serious if my husband’s comrades had not helped me” (AGS 69). Pension and handouts were not only requested by widows, but by any relatives who depended directly on the deceased officer. For example, it was common that several siblings had depended financially on the officer, and that these siblings would turn to the authorities for help. The sisters of Captain Gamero, for instance, asked for help because they lived at his expense and, although they had inherited his property, he had not left enough assets to guarantee their survival. In any case, the navy expressed a great deal of distrust toward most of the requests, and discreet reports – to confirm the arguments presented in applications and investigate the real situation of the applicants – were made whenever there were doubts about the veracity and legitimacy of the petition (AGS 69).

Another key factor in the operation of this rudimentary protection system was the professional reputation and the merits of the deceased officer. Before the creation of the *Monte Pío Militar*, a part of the pensions granted by the Crown were conceived as a posthumous prize to the officer. As a result, merits were often highlighted in the applications and in the reports commissioned by the secretary of state for the navy to evaluate them. Therefore, the pensions and handouts can be interpreted as a relief for the most destitute families, but also as a reward for the merits accumulated by officers throughout their career. As such, many applicants emphasized that the only asset that the family had left was the merits of the deceased officer, as illustrated in the petition submitted in 1734 by the Serrano Gómez Dávila sisters (AGS 69). However, the increasing use of discreet reports by the secretary of state to ascertain the truth and legitimacy of the applications suggests that the key criteria were the career and deeds of the officer, that is, a desire to mitigate the need for widows but also an incentive for the profession.

The creation of the *Monte Pío Militar* in 1761 largely superseded this rudimentary protection system, which remained in place only as an extraordinary expedient. The king retained the prerogative to extend his protection in situations that were excluded

from the regulations of the *Monte Pío* regulations. Specifically, the Crown continued to grant aid “by way of handouts” – generally one-off payments – and extraordinary pensions, but the practice was eventually discontinued in the early nineteenth century. This “extraordinary system” – that is, help that was granted outside the scope of the *Monte Pío Militar* – resulted in two main types of action between 1760 and 1800: emergency aid to mitigate the poverty of families and nepotistic pensions secured by powerful navy families. The sisters María Magdalena and Josefa Goycochea received the first type. They were the daughters of naval Captain Pedro Goycochea and, in a memorial, they described the poverty in which they lived after the death of their father and brother – a priest who had cared for them. The ministry commissioned a report and concluded that:

one of them is 50 years old and the other one 48; both are single women who do not own property except for the house which they inhabit and another, very small house . . . . The death of the priest brother is true and, although they have another brother who is a naval captain, he cannot help them as he is married and has children in Havana; these two sisters live by the labour of their hands and some secret alms; their needs are many because of the diseases that they usually suffer. (AGS 70)

During the second half of the eighteenth century, a group of families monopolized the highest positions in the naval hierarchy. They tried to capitalize on their privileged position by securing extraordinary pensions for themselves. For example, the families of the secretaries of state for the navy Julián Arriaga and Pedro González de Castejón secured extensive benefits, as did the wives and children of several general directors, general captains, and admirals – such as Juan José Navarro, Marquis of La Victoria, Andrés Reggio, and Luis de Córdoba. In any case, their privileges and benefits should be interpreted as a direct consequence of their positions in the naval hierarchy and, therefore, as a reward for their merits and services rendered. For instance, Rosa de la Torre, widow of the brigadier and Director of Engineers of the Navy Francisco Aufrán, was granted a pension in 1792, despite being excluded from the *Monte Pío Militar*. The commander of the Naval Department in Cadiz supported the petition and noted that “Francisco Aufrán is the first engineer of the entire Corps, equivalent to the General Engineer. His performance, intelligence and dedication are the highest praise of his career accomplishments” (AGMAB 5292).

The situation changed after 1795, and especially from 1800 onward (Kuethe 2014). The resources of the monarchy were limited and expenses grew exponentially, which led to many requests for extraordinary pensions being dismissed: the expression used was, “it cannot be granted in the current circumstances.” The secretary of state and the navy were aware of the great expenses generated by this type of request, which were granted according to blurry criteria, mixing reward, merit, and personal favor. In the early nineteenth century, all these requests were denied or simply diverted to the Ministry of Finance, but they did not disappear altogether until the 1830s (AGMAB 5298).

Prior to 1761, the whole system had depended on royal grace – the mercy of the king, who always had the final word. The new system, however, was from the start a norm-ruled bureaucratic system, and even the king, who lent his financial support,

understood that the system should be left to work independently.<sup>9</sup> All the public bodies involved – secretaries of state, the Council of War, and the *Monte Pío* board – wanted the application and granting processes to be as exhaustive and accountable as possible. This led to the recurrent use of discreet reports that sought to guarantee the fairness and reliability of the resolutions. On some occasions, these reports revealed a reality that bore little resemblance to the description submitted by applicants. The death of Captain Blas de Barreda in 1797 led to a confidential report being made on the lifestyle and resources of his widow, Modesta Cachipin. The report exposed that “this widow is the heir of six to eight thousand *ducados* of rent for her eldest son, and three thousand for the second one; Blas de Barreda was, without a doubt, a wealthy man, but left his papers badly organised” (AGMAB 5293). Although Modesta did not really need the pension because she had sufficient economic resources, she finally received it because she met all the requirements of the *Monte Pío Militar*. This reveals some interesting paradoxes in the operation of the protection system: although it was created with the aim of giving support to destitute widows and orphans after the death of their husband and father, its legal base and growing bureaucratization, which pursued a safer and fairer model, led to contradictory situations – in this case, fact that the right to receive a pension was separated from the specific circumstances of the recipient.

If the pension request system, especially the discreet reports issued during the first few decades, is analyzed, the monarchy’s interest in ensuring that all requests were dealt with legally and that they complied with the regulations is clear. This deactivated hitherto important factors, such as family, lineage, or social influence. In 1773, Serafina Cumplido, sister of Rear Admiral Francisco Cumplido, requested a pension befitting “the merits of her brother, at whose expense she lived” (AGS 70). Although in principle sisters did not have any rights, the application was taken into consideration after it was recommended by Andrés Reggio, the first admiral and general director of the navy. He said that the supplicant “lives with a single daughter and a very old aunt, and they all depended entirely on his support.” The application was automatically dismissed as “NHL,” which means denied for not conforming to the standard. The case of Josefa Ortiz was very similar: the widow of a lieutenant, she tried to apply for a *Monte Pío* pension, and had received a recommendation from the bishop of Sigüenza. The institution rejected it because she had married her husband when he was merely a second lieutenant (AGMAB 5296).

During the last four decades of the eighteenth century, the pensions managed by the *Monte Pío* were increasingly regarded as an acquired right, regardless of the specific circumstances and economic position of the beneficiary. For instance, Ana Llano, widow of Captain Joaquín de la Sota, requested a pension because she was in charge of four small children. The report stated that “this widow has the four children that she mentions, as well as a small estate, some vineyards and two houses that her grandparents left her”: that is, she had enough resources to care for her children. However, the petition was resolved in her favor, for “according to the *Monte Pío* regulations, she is entitled to half of her husband’s pay. She has

<sup>9</sup>Because of the state of the section “Pensiones” in the navy’s archive (Archivo General de la Marina), it is impossible to present quantitative information concerning the total number of pensions granted and their aggregate cost. The section is irregularly preserved and information is often hard to access.

all the necessary certificates and she just needs to address the petition to the general” (AGS 69). This resolution perfectly illustrates the fact that pensions, when all requirements were met, were beginning to be understood as an inalienable right.

During this period (1761–1800), two parallel processes were under way: the institution wanted to strengthen the bureaucratic and legal approaches to pension management as much as possible, and great efforts were also being made to associate the privileges inherent in the *Monte Pío* with the officers’ merits – although it could seem contradictory because the institution was not created to reward professional merits. While it is true that being a bad officer was not considered a valid reason to remove the right to a pension, it was considered reasonable for the navy to be particularly zealous in expediting the process when the deceased had distinguished himself. For instance, in 1797 the naval officer and engineer Juan Smith applied for membership of the *Monte Pío*, and the navy accepted his request because of “the great and outstanding merits of this officer” – in addition to the fact that he fulfilled all the requirements (AGMAB 5293). Another example is the pension requested by Francisco Gamboa’s widow led to a report that stressed the qualities of this deceased officer. The features highlighted in these reports were the same as those that were emphasized for promotions: “he was always a very good officer in the technical sense, as well as very modest, excellently behaved and loving and zealous in his duties” (AGMAB 5249). In any case, this pension was granted because the officer and his wife met all the legal requirements.

Over time, the number and quality of the reports issued for the *Monte Pío* increased. In fact, there is a direct relationship between the dearth of financial resources and the number of reports, especially from the 1790s onward: without a doubt, these reports aimed to ensure that pensions were not granted to persons who were not entitled to them. In any case, the main feature of the system during the late eighteenth and early nineteenth centuries was the desire to present the granting of pensions as an administrative procedure that was based on the principles of justice, law, rigor, respect for the *Monte Pío* regulations and deadlines, accountability, and reliability. In this regard, the case of Gertrudis Rabasquero is paradigmatic. When she became a widow in 1787, Gertrudis requested a pension, using the argument that “I have several children who depend on me, some of them working in the royal service.” Both the general director of the navy and the secretary of the state swiftly agreed that Gertrudis did not meet the requirements set out in the regulations, specifically because she had married when her husband was only a junior officer. Despite acknowledging the husband’s merits and “constant” dedication, it was resolved that “she is not entitled to a pension because should the practice of granting extraordinary pensions become generalised, this would pose a very heavy burden on the Royal Treasury” (AGMAB 5291). Years later, in 1792, Gertrudis tried again, and it was then revealed that she had come to a substantial inheritance (AGMAB 5192). In any case, that is not the reason she was not awarded a pension: the reason was that “she is not a member of the *Monte Pío*.”

The growing fastidiousness and the need to adhere to regulations should also be interpreted as an almost obligatory response to the financial problems that beset the *Monte Pío* and its increasing commitments. As a result, after 1795, and especially from 1800 onward, only those pensions that adhered strictly to the regulations were granted and, therefore, it became necessary to introduce more thorough control mechanisms.

The new regulations issued in 1796 clearly pointed in this direction because they established that cases that did not strictly comply with the requirements were to be automatically rejected. For instance, in 1805, Ignacia Montero de Espinosa, sister of Captain José Montero de Espinosa, requested the pension that her mother had been granted after the death of her brother. The administrative procedure concluded with a clear-cut decision: “it does not fall within regulations” (AGMAB 5295).

### Approach to the Development of the *Monte Pío* in the Navy during the Nineteenth Century

Between 1814, which witnessed the end of the Peninsular War and the Absolutist Restoration, and the 1830s – when a true Liberal State emerged in Spain – the *Monte Pío* was in a state of virtual paralysis (Bordeje Morencos 1989; Ferragut 2007; Lebrón García 2009; Martínez Ruiz 2003). Pensions continued to be processed and granted, but payments became increasingly irregular. Manuela Vulnes, widow of brigadier Isidro del Postigo, illustrated the gravity of the situation in a plea for help in 1815 because she was owed six months’ pension (AGMAB 5250; 5297). The situation did not improve in the 1820s – a period that was marked by an increase in the number of urgent complaints from pensioners. In 1823, a group of naval widows and orphans in the province of Valencia claimed that “we are already weak, and we can no longer suffer from the devouring hunger that is destroying our lives; we are crying today for one of our own, who has just fallen victim to her impulses . . . [we request that] remedy [is found for] so many evils” (AGMAB 5252). Misery in this social group seems to have passed from mother to child, as expressed by Cecilia Franco in 1829: “due to the delays suffered by the widows, my mother needs over 8,000 reales to be able to pay her creditors and ensure her subsistence, and thus asks that Your Majesty deigns to ensure that [the pension to which she is entitled, of] 4 reales per day, is paid” (AGMAB 5299). In any case, the applications posed by any person entitled to a pension were eventually recognized and the obligation to pay generated, even if with a certain delay.

Despite the severe economic problems that beset the *Monte Pío* during the second half of the 1820s and the first half of the 1830s – from 1835 these pensions were included in the national budget, the values and criteria that the institution embodied were consolidated. Norms superseded all other criteria, as the regulations became the only valid guideline. Family influence and relations, the patronage of important men, and recommendations were all useless if the applicants did not meet the necessary conditions set out in 1796. These changes should be contextualized within the framework of the slow process that led to the emergence of the Spanish Liberal State in the 1830s and 1840s, which involved important changes to administrative procedures and a new bureaucratic mindset. For instance, in 1836 María del Rosario Norma, widow of Captain Francisco Murias, requested a pension increase – she applied for a *capitán de navío*’s pension, even though she was entitled to a *capitán de fragata*’s – and in this endeavor was supported by the naval commander of Havana, who claimed that “her husband was an example of pride and efficiency in defending the throne and the just causes of the motherland” (AGMAB 5253). The petition was automatically denied because it had “no legal basis.”

During this period, a key change took place: the merits and services of deceased officers were not taken into consideration so much because it was now believed that professional qualifications should not be mixed with matters of protection and assistance. This logic was explicitly applied when Ana Mesa, sister of Lieutenant Domingo Mesa, requested a pension in 1827: “the General Director thinks that this request should not be accepted because should officers’ merits be considered good reason to grant pensions to their sisters, all available funds would be expended in helping an infinite number of sisters who are in your same position” (AGMAB 5299). The progressive transformation in values and behavior can also be detected in the attitudes surrounding extraordinary pensions. From 1830 and 1840 onward, the concession of privileges to the most important members of the naval officer corps and their families became truly exceptional. Although the granting of “extraordinary pensions” – pensions and monetary handouts granted outside the *Monte Pío* system – had been discontinued by the early nineteenth century, by 1830 requests of this sort were totally at odds with an institution that demanded strict compliance with the rules. For instance, when Vice-Admiral Juan María Villavicencio, one of the most powerful officers in the navy, demanded a pension for each of his daughters in 1827 so that they could enter the convent of La Encarnación – one of the most prestigious convents of Madrid, the ministry replied saying that “His Majesty has reluctantly dismissed the claim of the worthy general . . . because [these] pensions are prohibited” (AGMAB 5299).

The main transformation, therefore, was that the *Monte Pío Militar* managed pensions strictly according to the law, by means of a complex administrative system and the detailed examination of applications (Pro 2016, 2017). From this period onward, pensions were no longer an expression of royal mercy, but a regulated, acquired right, enforced by the all-embracing legality embodied by the administration of the Liberal State. Changes can also be detected in the language used in the record: legal expressions became increasingly predominant. As a case in point, María del Carmen Pazos asked to have the pension that her mother had enjoyed until her recent death. One report said the following: “her mother’s pension . . . was not transferred to the applicant because she was married before she could begin receiving it; but this should not be an obstacle according to the spirit of several royal orders that Your Majesty has dictated on this particular, and more so when an equal and identical grace was granted to Mrs María de la Candelaria Téllez, after the death of her mother in 1826.” The case of María del Carmen was complex because of the legal doubts that it raised for both the ministry and the *Monte Pío* board. Finally, “the General Director of the Navy, according to the opinion of the Auditor [the most important legal adviser, who was to become a key figure in the procedure] Mr Antonio Castell de Torreblanca, says that she is in the same circumstances as María de la Candelaria Téllez” and therefore that the pension must be granted (AGMAB 5299).

Between the mid-nineteenth century and the early twentieth century, the *Monte Pío* entered a stage of equilibrium and increasing stability. Internal regulations became more complex – although formally the 1796 regulations were still the basic norm – and, above all, the experiences of widows and other family members were linked increasingly closely to two phenomena of great importance: on the one hand, the triumph and absolute predominance of legality as the only ruling principle and,

on the other hand, the growing bureaucratization of the process. The zeal for emphasizing the rules as the only valid guidelines became one of the legitimizing forces of the system that, when the public treasury assumed the associated financial obligations, also managed to leave behind previous shortcomings. Throughout the second half of the nineteenth century, the principle of legality – the principle according to which the law and the norm are the only and unimpeachable criteria – came to dominate the experiences of the applicants and the officials who processed the petitions. This explains why the reports, which for so long had informed the ministry of the real circumstances of applicants, disappeared.

As such, pensions, as long as the requirements were met, were no longer regarded as a matter of royal mercy, but rather as a legal right in a modern sense, as reflected in an expression often found in the applications: “I ask for the pension that belongs to me.” The use of the verb “to belong to” – *corresponder* – by applicants is unequivocal evidence that they had fully interiorized the principle of legality; they were aware that the state had a duty to offer institutional protection and public care beyond the will of a king, a minister, or an official. For example, in 1888, the sisters Elena, Jacoba, and Josefa Ramos Izquierdo Oreyro “who reside in Cádiz, and are daughters of Vice-Admiral Juan de Dios Ramos Izquierdo and Elena Oreyro . . . , request the pension that belongs to them” (AGMAB 5300-270).

As previously noted, the language used in the documentation became increasingly bureaucratic, but some traditional expressions survived. For instance, “Your Majesty” continued to be used, but was now an invocation of state power, not royal will. An example, dated to 1870, is illustrative in this regard: “Dolores Ramírez de Arellano Reyna, . . . declares in the attached document . . . that she is an orphan and a spinster; therefore, she considers herself entitled to the pension that she legitimately deserves, according to the law. The applicant cannot doubt the goodness of Your Highness and hopes that the daughter of a naval officer who, during his long years of service, carried himself honourably so many times, does not lack the necessary means for her subsistence, since this is the only asset that he bequeathed her on his death” (AGMAB 5300-268). Also representative is the situation overcome by Micaela Gutiérrez de Rubalcaba in 1840. She was responsible for two minors, and requested a pension with the support of Admiral Francisco Javier Ulloa. An internal report on her husband pointed out that “his eminent services and valuable features, which will fill brilliant pages in the history of Spanish loyalty, are well known in the Navy and the Army, and not only in the Peninsula . . . . It is the duty of the State to attend to this need” (AGMAB 5300-148). Although, according to the generals of the navy, the widow was worthy of the help and protection of the state (Burguera 2012), she did not meet all the necessary requirements and thus it became expedient to redirect the entire legal process, by passing a specific bill to grant this widow her pension.

The other basic characteristic of the *Monte Pío Militar* in the second half of the nineteenth century was the development and consolidation of bureaucratic procedures, which became an inescapable formality for all applicants. This is a key factor because it represented an important change in the way power was understood and exercised. It was no longer possible to negotiate with generals or, ultimately, the monarch, but rather negotiation had to take place with an impersonal agent, who embodied the bureaucratic apparatus of the state, which was the actual source



of the protection. The increasing importance of bureaucratic procedures is not a trivial matter. Previously, doubtful cases could be solved by means of internal reports because ultimately everything depended on royal grace; from the mid-nineteenth century onward, however, formal bureaucratic procedures and the principle of legality reigned supreme. For instance, formal defects in the documents were deemed enough reason to reject the application submitted by María Soledad Pery Ravé in 1871: “the Supreme Court of War and Navy has declared that she is not entitled to the pension requested until she re-submits the application in the company of further supporting documents, in order to certify that the death took place in the line of duty, after which the Court will take the appropriate decision” (AGMAB 5300-254).

The sometimes burdensome administrative procedures were the flipside of public protection. All the widows and other relatives who were entitled to *Monte Pío* pensions had to follow the same steps as María Joaquina Heras Mergelina, widow of Vice-Admiral of the Navy Rafael Rodríguez de Arias, in 1882 (AGMAB 5300-149). At first, the applicant had to compile all the necessary documents, which generally included the petition, the officer’s service sheet, and a statement certifying the marriage between the officer and the applicant, as well as clarifying whether they had children. Once all the requirements had been checked, a file was begun in the ministry of the navy and was then sent to the Supreme Council of War and Navy, which since 1848 had assumed the duty to examine these issues. The internal evaluation that followed was relatively fast, and took approximately one month; it was finally resolved by the council which convened in a plenary session. The process could be slowed down if, in the council’s opinion, there was a problem of a legal or an administrative nature. In this case, the petition was sent to the Council of State, where the legal implications of the case were examined in great detail.

## Conclusion

The present work aimed to analyze the creation and development of the Spanish *Monte Pío Militar* during the eighteenth and nineteenth centuries, and to highlight the innovations introduced by this institution. The most important idea, in this sense, is that the *Monte Pío Militar* was neither a charity nor a modern pension system. Although its apparent aim was to provide protection and economic support for the families of deceased officers, this was considered a part of a bigger and more complex “contract,” which must be contextualized within the progressive increase of the power of the monarchy – especially over royal servants – and must be considered a reflection of the process of the professionalization of navy and army cadres. The new embodiment of the naval profession was built around the officers, but also around their families, especially their wives; as a result, women played a key role in the aforementioned “contract” – both before and after the death of their husbands. In other words, the pensions granted by the *Monte Pío Militar* were far removed from the traditional expressions of royal grace; rather, they were a projection of a new relationship between the monarchy and its officers. The Crown recognized that acquired rights were beyond certain specific circumstances and the goodwill of individuals: they were an integral part of the public good.

Thus, this form of institutional protection was not a sign of benevolence, but rather was fundamentally a form of public social insurance for surviving dependent relatives and also, at least during the last third of the eighteenth century, an indirect way to reward officers for their effort, accomplishments, and merits. Pushing this project forward during the second half of the eighteenth century was a great challenge, especially because the *Monte Pío Militar* represented new values in a society in which social rank, lineage, and patronage were still the dominant forces. The regulations of 1761 and 1796 illustrate how the monarchy attempted to furnish the new system with an adequate administrative apparatus. Initially, these attempts were implemented to aid royal grace, which was still regarded as the decisive agent, although decisions were based on objective criteria – of which the internal reports are a good example.

The development of the *Monte Pío Militar* during the nineteenth century requires in-depth scrutiny if we are to understand this organization and its social impact. Despite the politically unstable nature of the period – civil and foreign wars, revolutions, insurrections, as well as changes of government and political system – and the serious financial shortcomings of the Spanish State, the status of pensions as acquired rights was consolidated; establishing with precision and fastidiousness, the objective principles that should rule the organization was no easy task – it may indeed be regarded as a state's obsession, and is reflected in the extreme bureaucratization of the process and the reiterated appeals to the force of the law. This, however, led to a paradox: although these measures tried to make clear that the institutional protection apparatus of the state was impartial and fair – in this case, providing naval officers with their deserved rewards – they ultimately became more important than the actual substance. This is illustrated by the use and meaning of the verb “to belong to” – *corresponder* in Spanish – not to refer directly to widows' needs or the merit of naval officers, but rather to the rights generated by the norm.

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