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Spanish expeditions to the Northwest Coast during the Bucareli administration, 1771-1779

Mark Cronlund Anderson
Portland State University

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AN ABSTRACT OF THE THESIS OF Mark Cronlund Anderson for the
Master of Arts in History presented June 6, 1989.

Title: Spanish Expeditions to the Northwest Coast During the
Bucareli Administration, 1771-1779.

APPROVED BY THE MEMBERS OF THE THESIS COMMITTEE:

Victor C. Dahl

Gordon B. Dodds

Charles R. White

Carl Abbott

No discreet study of the Spanish voyages of discovery
and exploration to the northwest coast of North America
during the 1770's has been published in English. The purpose
of this thesis is to examine the Spanish expeditions of
1774, 1775, and 1779, directed by New Spain's Viceroy
Antonio Maria Bucareli y Ursua (1771-1779).

Most immediately, the 1770's expeditions sought to establish a legally tenable Spanish presence on the northwest coast to thwart perceived foreign--especially Russian and British--designs. Viceroy Bucareli's detailed instructions reflected these concerns. The mariners--Juan Perez, Bruno de Hezeta, Juan Francisco de la Bodega y Quadra, and Ignacio Arteaga--were successful in fulfilling their orders to varying degrees and for different reasons, historians have argued.

By examining the extant literature on the earlier--sixteenth and early seventeenth centuries--voyages to the northwest littoral, one can delineate other, culturally determined continuities between the impetuses behind the early voyages and those of the 1770's. Curiously, this linkage has gone unnoticed by historians.

The Bucareli-directed expeditions have been examined by scholars tangentially, as parts of other studies. The body of literature is not immodest; the conclusions reached are mixed. Few of the studies rely on primary research, and many simply relay the ''facts'' without syntheses. The more direct investigations, typically focused on the 1790's Nootka Sound controversy which brought Spain and Britain to the brink of war, fashion narrative structures into which the Bucareli-directed expeditions serve as ''setting.'' Fortunately, the respective ships' logs exist in translated form.

Research for this thesis was conducted at the Portland State University Library, the Multnomah County Library, the Oregon Historical Society Library, and the Provincial Archives in Victoria, British Columbia.

SPANISH EXPEDITIONS TO THE NORTHWEST COAST DURING THE
BUCARELI ADMINISTRATION, 1771-1779

by

MARK CRONLUND ANDERSON

A thesis submitted in partial fulfillment of the
requirements for the degree of

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1989

TO THE OFFICE OF GRADUATE STUDIES:

The members of the Committee approve the thesis of Mark
Cronlund Anderson presented June 6, 1989.

Victor C. Dahl

Gordon B. Dodds

Charles R. White

Carl Abbott

APPROVED:

Bernard V. Burke, Chair, Department of History

C. William Savery, Interim Vice Provost for
Graduate Studies and Research

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Professor Dahl on a number of occasions reminded me, paraphrasing Herbert Eugene Bolton, as I recall, that completing a project of this sort required sitting down and not getting up until one had put a good shine on the seat of one's pants. He was right. I would like to thank him for his wise, considered counsel, his good humor, and his no nonsense editing.

And Carmen, well, I thank her for everything.

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CHAPTER I

PRELUDE TO THE SPANISH LAKE

The purpose of this thesis is to examine the Spanish expeditions to the northwest coast of North America that sailed during Viceroy Antonio Maria Bucareli y Ursua's administration, 1771-1779. In order to achieve this aim several factors, apart from the voyages per se, must first be addressed. Chapter I explores the linkage that existed between the initial expeditions to the northwest littoral in the sixteenth and early seventeenth centuries and those under Bucareli's direction in the 1770's. This chapter also examines the socio-cultural context in which the early northward thrust occurred, that is, a purview of the salient elements of Hapsburg rule of the Spanish empire.

Chapter II introduces the key players promoting the 1770's expeditions, Viceroy Bucareli and Visitador Jose de Galvez. These two prominent figures require placement within the context of the Enlightenment, of which they were a part and product; thus, the transition between Hapsburg and Bourbon rule of Spain's empire is fundamental, as are the steps Bucareli and Galvez took with regard to the northwest coast. The final elements of the socio-cultural linkage tying the Bucareli-directed expeditions to the sixteenth and seventeenth centuries were three apocryphal forays into

the Northwest Passage, reputedly sailed between 1588 and 1640.

The courses of the expeditions--Juan Perez in 1774, Bruno de Hezeta and Juan Francisco de la Bodega y Quadra in 1775, and Ignacio Arteaga and Bodega y Quadra in 1779--and what they accomplished, are traced in Chapter III. These narratives require some explanation of Bucareli's detailed instructions for the sailors, especially with regard to possession-taking.

The penultimate chapter of this study examines how historians writing in English have evaluated the expeditions, and why. Bodega, for example, has been praised enthusiastically by virtually all northwest scholars, while Perez has been both vilified and lauded. Following Chapter IV a series of observations conclude the text of this work.

EARLY VOYAGES

Spain's interest in the northwest coast of North America which spanned from the sixteenth through eighteenth centuries, has received considerable notice by historians writing in the English language. However, the pivotal first voyages of the eighteenth century that returned Spanish influence to the region after almost two centuries of neglect sailed during the viceregal administration of Antonio Bucareli (1771-1779), and have curiously remained relatively unstudied as a discreet topic of inquiry.

How history has treated the mariners of the Bucareli years is of especial importance because Spanish territorial claims to the northwest coast that drew the Iberian nation to the brink of war with Britain in the early 1790's in large part derived from the accomplishments of these expeditions. Spain's backing away from its claims to absolute sovereignty to avoid conflict with its long-time rival effectively signaled the end of Spanish efforts to secure the region.

History has generally measured the successes of the voyages in the context of the Spanish attempt to protect the coast and the hinterland it sheltered from foreign encroachments. The more general impetuses behind Spain's northward thrust in the 1770's reached back hundreds of years to the essential reasons that led Spain to discover and conquer the New World, but for the most part they have not been discussed in the literature. Yet the general causal factors engendering the Bucareli expeditions largely mirrored those behind the earliest voyages of the late sixteenth and early seventeenth centuries.

The story of the Spanish presence on the Pacific coast of North America logically begins with its discovery by Vasco Nunez de Balboa who sighted the world's largest body of water from its western shores in 1513. Balboa, like Hernan Cortes and Francisco Pizarro a native of the Spanish province of Extremadura, had only recently united the failed colonies in Panama and northern Colombia (1509-1511) when

tales of a land fabulously rich in gold reached him.¹ A true *conquistador* Balboa was moved to lead an expedition across the isthmus where, he had been assured, he would encounter a great sea, beyond which to the south lay a land of riches (Peru).² Of course, Balboa never arrived there; in fact, his accomplishment as being the first European to see the Pacific from its western shore provoked the envy of Pedrarias Davila, his father-in-law and governor of the Panamanian isthmus, who ordered Balboa to be tried, condemned, and beheaded in 1519.

After Hernan Cortes, first chief of the Conquest of Mexico, had largely subdued the Aztec confederacy in the 1520's, he turned his rapacious appetite to the Pacific coast. As de facto governor of New Spain he outfitted several expeditions to reconnoiter northerly waters. In 1532 native Americans on the Sinaloa coast massacred the first of these parties, led by Diego Hurtado de Mendoza.³ A second expedition consisting of two ships--the first of which 'turned back before accomplishing anything of importance'⁴--mutinied and killed the captain of the latter

¹ For the sake of clarity and readability all place names employed will those presently used.

² This point should properly stand as conjectural: the Indians often lied to the invaders with the hope that they would simply go away. See Clarence Haring, *The Spanish Empire in the America* (New York: Oxford University Press, 1947).

³ Maurice G. Holmes, *From New Spain by Sea to the Californias* (Glendale: The Arthur H. Clarke Co., 1963) 57-58.

vessel. The voyage managed to continue under the capable hand of its former pilot, Fortun Jimenez. Yet this exploration, like that of Hurtado de Mendoza, ended tragically when native Americans killed most of its crew in the vicinity of La Paz, at the south end of the Baja peninsula. More importantly, the survivors returned with fabricated stories of gold and pearls.⁵ Thus, in 1535 Cortes himself sailed north, landing near La Paz, only to shortly return to Mexico empty-handed.⁶ This expedition, moreover, encountered considerable difficulty in actually reaching Baja California: 23 men died of starvation.⁷

Meanwhile, other chimerical tales of riches in distant lands fueled a predisposition among circles in the viceregal capital, Mexico City, to substitute fantasy for reality. For example, rumors of the heralded metropolis of *Cibola*, one of seven such purported cities rich in gold, silver, and emeralds, encouraged Cortes to deploy three subsequent expeditions up the coast.⁸ In 1539 Francisco de Ulloa led the most noteworthy early expedition to the end of the Bay

⁴ Warren Cook, *Flood Tide of Empire* (New Haven: Yale University Press, 1973) 2.

⁵ Cook, 5.

⁶ See Holmes's chapter, "'To California with Cortes,'" 12-30.

⁷ John W. Caughey, *California* (New York: Prentice-Hall, Inc., 1940) 53.

⁸ According to a legend, after the eighth century Moslem invasion of Iberia, seven Portuguese bishops fled to the west and founded the enchanted cities of *Cibola*. Paul Horgan, *Conquistadors in North American History* (New York: Farrar, Straus and Company, 1963): 115-16.

of California, thereby demonstrating the coastline's contiguity and that Baja California formed a peninsula. Oddly enough, royal officials and other explorers ignored this information, choosing instead to believe it was an island, until its 're-discovery' by Padre Eusebio Kino in 1701. And it was not until 1746 that royal officials declared California *no es isla pero es tierra firme*.⁹ Additionally, Maurice Holmes maintains that Ulloa, after rounding Cabo San Lucas, sailed as far north as present-day San Diego. Warren Cook, among others,¹⁰ tempers this claim in asserting the voyage passed no further than 30 degrees North latitude (San Diego is located at about 33 degrees North). Writing in the late nineteenth century, Hubert Howe Bancroft in a seminal work largely shrugs off the voyage as altogether devoid of any substantive historical importance, except with regard to the 'forgotten' yet accurate discovery that Baja California formed a peninsula, not an island.¹¹

⁹ Irving B. Richman, *California Under Spain and Mexico* (New York: Cooper Square Publishers, 1965) 59.

¹⁰ See Henry R. Wagner, *Spanish Voyages to the Northwest Coast of America in the Sixteenth Century* (San Francisco: California Historical Society, 1929) 14. Holmes's calculation was clearly taken from the official journals of the voyage. Wagner's work, however, in the minds of virtually all authoritative recent accounts transcends the veracity of sixteenth century nautical instruments. It is somewhat surprising that Holmes chooses the original, given the quality of his study and the stature of Wagner's cartographical corrections.

¹¹ Hubert Howe Bancroft, *History of the North Mexican States*, XV (San Francisco, 188-) 79.

The Seven Cities tales inspired Viceroy Antonio de Mendoza¹² to send an expedition north on the coast in 1540, primarily to support Francisco Vasquez de Coronado's overland venture. Three vessels fitted at Acapulco and led by Hernando de Alarcon sailed up the Gulf of California where, apart from exploring the Colorado River, they waited in vain for a signal from Coronado. In November of 1540 the party returned to port in Colima, as its orders stipulated.¹³

After one failed mission in 1542, later that same season Juan Rodriguez Cabrillo sailed northward on Viceroy Mendoza's orders to search for the Northwest Passage. Cabrillo met with no luck, but he traversed the coast as far as San Francisco without, however, espying the bay.¹⁴ Cabrillo died before the voyage concluded, and to add insult to injury, the accomplishment of having sailed so far north was hushed-up, in keeping with the official Spanish penchant for secrecy. Such policies would be significant with regard to later voyages.

¹² Mendoza's arrival in 1535 officially supplanted Cortes's authority, although since the late 1520's a royal body, the *Audencia*, technically wielded the highest manifestation of Spanish regal authority. See Haring, *passim*.

¹³ Holmes, 92-98.

¹⁴ While it may seem curious that one could sail to or past San Francisco without espying the bay, such is the Pacific coastline. With some regularity prominent features of the littoral were often past unnoticed. Both Cook and Wagner attribute the phenomenon to endemic foggy weather and to a reluctance of mariners to stray too close to shore.

The next important incursion into northern Pacific waters was not by a Spaniard at all but rather by an Englishman, the redoubtable Sir Francis Drake, who set sail in 1577 with a complement of five ships, with he himself commanding from the 180 ton *Golden Hind*, the only vessel that survived the expedition. Two aspects of his expedition are relevant to this study. First, the intrepid knight seaman rounded Cape Horn and subsequently both raided Spanish coastal settlements and seized the Manila Galleon. Spanish authorities clearly and understandably took alarm at the seeming ease with which Drake operated. Second, his mission, like Cabrillo's, had orders to search for the Northwest Passage and, to that end, met with no more success than the unfortunate Spanish mariner.

THE MANILA GALLEON

Spain established the Manila Galleon, an annual trade convoy running between Manila and Acapulco, in 1565, 44 years after Ferdinand Magellan claimed the Philippine Islands in the name of the Spanish Crown. Magellan, a disaffected Portuguese mariner, had thrown in his lot with Spain in 1517 and while in its employ became not only the first to navigate the treacherous waters of Cape Horn but the first to circumnavigate the planet.¹⁵

¹⁵ William Lytle Schurz, *The Manila Galleon* (New York: E.P. Dutton & Co., Inc., 1939) 17-18. See also the chapter titled, "The Manila Galleon," in Richman, 12-30.

Following Magellan's return to Spain in 1522 several expeditions--including those of Garcias Jofre de Loaysa in 1525, and Sebastian Cabot in 1526--attempted to retrace his route, without success. In 1542 six ships duplicated the feat, but accomplished ''nothing lasting.'¹⁶ Not until 1564 did colonial officials determine that annual trade with the islands constituted both a desirable end and a feasible goal. Of voyages averaging six months duration the service shuttled goods to and from the islands and Mexico, many of which eventually reached Spain.

The fright given Spanish authorities by Drake's exploits compounded the fact that until 1579 the Galleon had been without--indeed, without the need for--any protection. Spain's considerable success in largely hiding the trade's existence goes a long way toward explaining its preoccupation with maintaining strict secrecy about these voyages.¹⁷

SEARCH FOR THE STRAIT OF ANIAN

Drake's quest to find the Northwest Passage mirrors a similar ongoing Spanish colonial preoccupation. More commonly known as the Strait of Anian, the passage reputedly linked the two great oceans, Atlantic and Pacific. Desperately sought by the geographically disadvantaged

¹⁶ Richman, 13.

¹⁷ See Cook, 7.

English--and by all her European rivals--a strict economic imperative guided the search for the elusive strait:

The importance of transoceanic transport for the importation of commercial products from the Orient was due to the fact that carriage by land in the sixteenth century, as today, was very costly; and so slow as to impair the quality of these products, chief of which were spices, while in transit...It was estimated at Venice that products costing a ducat in the Far East became worth from seventy to one hundred ducats when they arrived there. By the time they reached the western extremities of Europe the cost was still further increased; thus it is no wonder that both the English and the French merchants were eager to find an all-water route free from Spanish and Portuguese interferences.¹⁰

In what proved to be horrifying for Spain, in 1587 Thomas Cavendish successfully duplicated Drake's looting of the galleon. Spanish authorities immediately imagined that Cavendish--and, by extrapolation, pirates in general--had found and had begun to ply the Strait of Anian. This fear and two other factors fundamentally convinced Spain to return to the northern coast. First, the galleons and their crews had long suffered because the overladen vessels spent so long at sea that both ships and sailors literally gave out--sinking and dying with devastating regularity. Settlements on the northwest coast might ameliorate these abysmal conditions since typically the galleon first sighted land hundreds of miles north of Acapulco near Cape Blanco, California; thus, settlements in Alta California could relieve some of the pressures wrought by overlong stays at

¹⁰ T.A. Rickland, "The Strait of Anian," *British Columbia Historical Quarterly* 5 (1941): 161-62.

sea: rotting timbers might be replaced, or scurvy could be treated. Second, the new viceroy, Luis de Velasco (1590-95), 'exceeded his predecessors in zeal for discovering this passage.'¹⁹

John Cabot's voyage to Cape Breton Island on Canada's east coast in 1497 aroused the earliest interest in the passage. The idea first appeared in print in 1527, and by 1540 mapmaker Sebastian Munster had drawn a facsimile of the putative strait. A Flemish cartographer, Abraham Ortelius, created the second such map, said to be of Italian origin. These earliest purported set of directions point to the remarkable fecundity of the human imagination: Munster's theory rested on America being an island separated by water at its northern coast from two other large isles;²⁰ Ortelius followed a more traditional approach and fancied the passage an actual sea-lane along the northern fringes of a single continent, North America.²¹ Subsequent claims pointed both north and south. Drake's voyage, of course, demonstrated that no southern passage existed. So, literally, given the

¹⁹ Cook, 10. As noted, Drake also sought the strait, however, he turned away from the Northwest coast officially at 48 degrees North latitude. There has been some debate as to the veracity of this 'official' claim, first published in 1628. Wagner, for example, compellingly argues that Drake turned out to sea at a point no further north than 43 degrees. Moreover, Cook charges, the English claim was purposely doctored for political reasons. See Henry R. Wagner, *Sir Francis Drake's Voyage Around the World: Its Aims and Achievements* (San Francisco: California Historical Society Press, 1926) 135-43. See also Cook, 7-8.

²⁰ Wagner, *Spanish Voyages*, 359.

²¹ Rickland, 166.

nature of the speculation, mapmakers returned to their instruments and their imaginations.

Not unexpectedly Spanish authorities were not immune to the persuasive powers of such notions, and, as noted, by the early 1590's had urgent reasons for a northward thrust both of exploration and of limited settlement. Where Cortes had sought riches, more glory, and potential Christian converts--for he was a pious man²²--the newer impetuses, while not blind to these lures, were more defensive in scope: essentially colonial officials wanted to protect a good thing, and, additionally, if possible acquire more of it. But, primarily the hope for a new, safe, stop-over port engendered the next visit to the northwest littoral.²³

Sebastiao Rodrigues Cermenho directed the galleon to Manila in 1594 and on his return sailed as far north on the American coastline as about 30 miles south of the 42nd parallel, the California-Oregon Border.²⁴ He later landed

²² With trenchant accuracy Cortes immodestly recorded: "I have toiled without cease for 40 years, eating poorly, through times good and bad...placing myself in danger, spending my fortune and my life, all in the service of God. I brought sheep into His fold in unknown lands...while gaining for myself appropriate wealth and esteem." Cited in Peggy K. Liss, *Mexico Under Spain, 1521-1556* (Chicago: The University of Chicago Press, 1975): 21.

²³ The ensuing voyages of Sebastiao Rodrigues Cermenho and Sebastiano Vizcaino may have been influenced by yet another mythical tale--the voyage of Juan de Fuca in 1592 to the strait bearing his name. Fuca claimed to have found, entered, then returned from the passageway at a latitude almost exactly where the Straits of Juan de Fuca now exist. Whether or not Fuca's voyage actually took place has been a matter of some controversy, which will be discussed in Chapter II. See Cook, 22-31.

near Drake's Bay, California, and formally took possession for the Spanish Crown.²⁵ While ashore the landing party witnessed the ship's destruction by a squall. Incredibly, the 70 or so survivors continued in the shore launch to a safe port, but proved unable to fulfill the other, essentially cartographical task of the mission.

The next expedition northward put to sea in 1596, captained by Sebastiano Vizcaino, with a first royal order to establish a colony with a satisfactory harbor on the Baja California coast. Despite the aridity Vizcaino attempted a settlement at La Paz--with no success. Respecting the wishes of Philip III, who ascended the Spanish throne in 1598, Vizcaino returned to northern shores in 1602, outfitted with a year's supplies. The flagship *San Diego* managed to attain a latitude of 42 degrees North; a second vessel, the *Santo Tomas*, foundered at sea; the third ship, the *Tres Reyes*, reconnoitered the coast at lower levels, and rendezvoused with the *San Diego* in 1603 at the port of Acapulco. This

²⁴ This curious enterprise found Viceroy Velasco reluctant to allocate funds for the expedition from his own budget, although he fully supported it. Cermenho, meanwhile, insisted that sufficient monies be given him in the event that the party land in such foreign ports as where money might be required. The compromise reached gave Cermenho access to the funds of the returning galleon--which wouldn't affect Velasco's financial statements--thus he set sail for Manila. Wagner, *Spanish Voyages*, 155-56.

²⁵ Of considerable legal and symbolic importance the issue of 'taking-possession' will be discussed in Chapter III.

remained the last planned expedition²⁶ to the northwest coast until vessels arrived at Monterey in 1769.

By this time, Spanish officials were apparently convinced that discovery of the strait--and it would be considerably to the north the numerous voyages had demonstrated--could only lead to its exploitation by interlopers. Such an event, colonial officials believed, would directly threaten the security of New Spain's northern frontier, as well as its productive silver mines. Of course, while this argument obviously overlooks the fact that the passage might be discovered from the east which would presumably lead to the same unfortunate result for Spain, the literature is silent. Henry Raup Wagner notes nothing more than such exploration in the east "'always elicited the interest of the Council of the Indies.'" Additionally, fever for the imagined northern wealth for the most part had subsided. The "'timber, grain, fruits, petroleum, and the multitudinous products which now bring wealth to this region were valueless or would have been had they been

²⁶ It is necessary to qualify this statement (i.e., use of the word "'planned'") because archaeological evidence has revealed that a vessel went down off the Oregon coast at about 45 degrees North latitude early in the eighteenth century. The wreck littered beaches with beeswax which subsequently served as a trade item for the native Americans living nearby. "'The best educated guess'" indentifies the ship as the 1707 Manila Galleon, *San Francisco Xavier*. See Donald C. Cutter, "'Spain and the Oregon Coast,'" *The Western Shore*, ed. Thomas Vaughan (Portland: Oregon Historical Society, 1976) 37-38. See also Cook, 31-35.

produced."²⁷ And the rugged coastline itself often presented an uninviting visage.

Clearly, a flexible myriad of forces predicated Spain's early north coast thrust, including a desire to Christianize and an ephemeral urge to settle, a lust for riches and adventure, and a concern both to find and to protect from alien penetration the Strait of Anian. Yet a full understanding of the expeditions necessarily depends on placing them into a socio-cultural context. While a representative picture of the whole of colonial Mexico is not required, it is instructive to delineate certain salient elements of the society from which the early voyages were launched.

COLONIAL SOCIETY IN NEW SPAIN

The fundamental social, cultural, and economic premise of Spain's effort in Mexico served to make the colony as much like the Mother Country as possible. Careful grooming would guarantee, among other things, perpetual dependence. This occurred both as a conscious administrative effort, and at a more subtle level, as the new settlers were, after all, products of a certain environment. In short, New Spain's *raison d'être* dictated service to the same twin towers--God and Potentate--as its parent.²⁸

²⁷ Wagner, *Spanish Voyages*, 284-85.

²⁸ Timothy E. Anna, "Spain and the Breakdown of the Imperial Ethos: The Problem of Equality," *Hispanic American Historical Review* 62 (1982): 254-72. See also Haring's

New Spain's administrative structure cast a mirror image of the strict hierarchy of the mother country. Atop the colonial peak sat the viceroy as sat the monarch in Spain.²⁹ All secular authority derived from this fount except, of course, that the viceroy answered to the crown. A series of lesser officials completed the corporate ladder.³⁰ For comparative purposes, the salient feature to note was its heretical nature vis-a-vis the North American Lockean tradition.

Yet still above the potentate sat God, whose commander-in-chief on earth, the Pope, held the monarch morally responsible and accountable for his or her actions. The yardstick of the juridical canons of the One True Faith, Roman Catholicism, measured the ruler's actions. In fine, Spain's political system bordered on theocracy. Likewise, in New Spain the church expected colonial officials to act with unctuous piety. And as the pyramidal shape of colonial

seminal work, *The Spanish Empire*, the political discussion of which is especially illustrative. For the spiritual bridge between Spain and New Spain see Charles Braden's *Religious Aspects of the Conquest of Mexico*. The economic relationship is carefully investigated in Lesley Byrd Simpson's *The Encomienda in New Spain* (Berkeley: University of California Press, 1930).

²⁹ It will be recalled that until the late 1520's Cortes, in effect, governed the colony, and that the first viceroy, Antonio de Mendoza, did not arrive until 1535.

³⁰ While far beyond the scope of this paper the 'corporate' system has been identified as so profound a phenomenon that it exists in modified form even today. In her study of sixteenth century New Spain, Liss writes, corporatism 'was a way of thinking order into diversity...a theory employed by central authority to facilitate control...embedded in language and religion.' Liss, 145.

administration mirrored the top-down model of the Old World, so too did the New World church mimic its Iberian parent. That is, the archbishop (i.e., New Spain's pope) balanced the viceroy (i.e., New Spain's monarch).

The theocratic nature of colonial society explains the missionary impulse that played a part in virtually every early voyage northward. Clergy were deemed as necessary to such expeditions as bread and fresh water. The most obvious example of just how deep this notion lay bedded in the Spanish psyche is that the Conquest of the New World could be justified only insofar as it successfully spread God's word, an order unequivocally spelled out by Pope Alexander VI's Papal Bull of 1493.³¹

Spain's economy can best be described as mercantilist, a label also applicable to its European rivals. Yet the peculiar Spanish variant of this economic theory stressed the accumulation of bullion over trade per se. This idea "was conditioned by the prevailing belief that gold and silver alone constituted wealth," according to Professor Clarence Haring. "Each nation," he writes, "must keep what it had and get as much as possible from others.... Mercantilism was essentially a protectionist system."³² As a result, the mother country monopolized trade. Thus, as a religious imperative fueled the spiritual Conquest and played a role in the early push up the western littoral, so

³¹ Simpson, *Encomienda*, 37.

³² Haring, 293.

a lust for riches underscored Spain's interest in Mexico and beyond. "We came here to serve God, and also to get rich," *conquistador*-historian Bernal Diaz noted.³³ In no small measure then, Spain kept Mexico for the profits, and likewise abandoned the north coast for its apparent dearth of riches.

The empirically difficult to measure concept of sense of adventure as causative agent thrived in New Spain's early expansion and exploration. To this extent, the stereotypical image of *conquistador* as indomitable rogue is quite accurate. The language used to describe the voyagers-- "explorers," "discoverers," and so on--connote the evidence needed to substantiate the point. Irving Leonard's *Books of the Brave*, for example, convincingly demonstrates how sixteenth century Romantic literature both engendered and manifested the ubiquitous will to adventure.³⁴ Gold, Glory, and Gospel, says he, were super-charged imperatives driven by the written word:

After 1500 particularly his [the conquistador's] imagination was kindled to an almost mystical exaltation of adventure and romance by the many books which began to pour from the presses.³⁵

³³ Cited in Liss, 20.

³⁴ Irving A. Leonard, *Books of the Brave* (Cambridge: Harvard University Press, 1949), *passim*.

³⁵ Leonard, *Books*, 12.

HAPSBURG RULE

Very broadly speaking, official colonial life was neither static nor especially active during the sixteenth and seventeenth centuries. A time of greater range for individual decision making by the viceroy and his subordinates marked the former hundred years, while the latter period witnessed increasing centralization of decision making. This change directly reflects the vagaries of the ruling House of Hapsburg, truly a dismal lot. Colonial administration, as a result, performed sluggishly and inefficiently. For example, if nothing else, the months spent at sea for ordinary correspondence to reach Mexico (and vice versa) meant important decisions sat in limbo. Moreover, the crown concerned itself less with competency than with loyalty in its selection of candidates for postings in the New World or in the apparatus of government in Spain.³⁶

The crown unified in 1478 under Ferdinand of Aragon and Isabella of Castille after centuries of struggle between competing princedoms. When the queen died in 1504 the whole peninsula, save for Portugal, fell under Ferdinand's regency.³⁷ When Ferdinand died in 1516 his grandson, Charles

³⁶ A.W. Lovett, *Early Hapsburg Spain, 1517-1598* (Oxford University Press, 1986) 83-97.

³⁷ Isabella willed that her daughter, Juana, inherit the possessions of Castille. The princess, however, proved unequal to the task because of mental instability; thus, in keeping with the queen's instructions, Ferdinand assumed control.

V, ascended the throne with dominion over Spain, Naples, Sicily, and the Spanish holdings in Africa and the Americas. Additionally, he inherited title to The Netherlands and to lands in Germany from his paternal Hapsburg grandparents, Marie of Burgundy, and the Holy Roman Emperor Maximillian.

Despite grandiose plans³⁸ and considerable energy, Charles V governed ineptly. Ascending the throne totally ignorant of Spanish, Charles forcefully attempted to re-direct the monarchy, and "ruled as a traditional dynast, governing as overlord." His new subjects immediately viewed him with "suspicion, then open hostility," angered at the prospect of serving a "foreign-born and foreign-reared king and his non-Spanish, rapacious officials and courtiers."³⁹ A failed revolt against the king's doctrinaire absolutism in 1520-21 left Charles--and the House of Hapsburg--firmly ensconced as ruler of Spain. When he at length renounced the throne in 1556 Spain lay prostrate, bankrupt and heavily in debt to German and Italian investors.

His son, Philip II, proved to be of no greater stature than the father. Though the taking of Portugal in 1580 increased naval strength, war with Britain utterly devastated Spain's mighty Armada in 1588. Then, from Philip's death in 1598, the picture for Spain only worsened.

³⁸ Charles sought, for example, to marry off his son to Mary Tudor of England, which would have effectively united the ruling houses of the world's greatest maritime power, Spain, with its heir apparent. Mary's untimely death in 1558 scuttled the plan.

³⁹ Liss, 32.

The first two of the three seventeenth century Hapsburg monarchs--Philip III (1598-1621) and Philip IV (1621-1665)--managed to lose much of The Netherlands, Flanders, Luxembourg, Portugal, and other holdings. Weak and incompetent they chose to leave the work of government to hand-picked favorites. The rule of Charles II, last of the Hapsburg line, proved even more disastrous for the Spanish Empire. He has been judged "the most degenerate, and the most pathetic victim of Hapsburg inbreeding...mentally subnormal...no more than a cipher, a shadow king."⁴⁰

As its European rivals inexorably eclipsed Spain, the colony advanced slowly, reflecting the character of Hapsburg rule. Despite the extraction of great wealth from extremely productive silver mines (bullion!) the mother country siphoned off virtually all the profits to service its many debts. Meanwhile, colonial policy so restricted trade in New Spain that only one port, Veracruz, remained open for business; and to it could only come goods from the trade monopolists at Seville and Cadiz. Moreover, exhaustive mercantilist regulation severely hampered colonists' ability to establish indigenous industries while, given the nature of monopoly, the imported goods commanded unreasonably high prices and frequently exhibited poor workmanship.

Under such conditions it is not surprising that smuggling plagued Spanish officials in the Gulf of Mexico,

⁴⁰ John Lynch, *Spain Under the Hapsburgs* (Oxford: Basil Blackwell, 1969) 229.

despite the fact that it merited punishment by pain of death. As the sale of contraband thrived, the Spanish and colonial economies suffered because smuggling precluded both Spanish profit-making and the collection of potential tax revenues.

Ironically, the Church in New Spain thrived under Hapsburg rule, especially during the seventeenth century. This institution amassed ever more substantial tracts of land--rendered, incidentally, quite unproductive--and achieved an hegemonic position, not unlike the Medieval Church in Europe:

...the Spanish church in America, managed to create a vast material base that ultimately reached into every corner of the newly converted Indies. Apprehensive of clerical power while at the same time convinced that restriction on rights to property would spare the church material concerns that might interfere with its spiritual mission, the crown sporadically opposed, but in the end was unwilling to limit, the income of an institution that provided the fundamental social cohesion in a disparate but pious empire.⁴¹

The Church acted as the principle money lender in New Spain and, as the Inquisition reached its long arm across the Atlantic, in a metaphorical sense the One True Faith provided banking services both temporally and spiritually.

As the eighteenth century beckoned New Spain had in a very real sense been isolated from international trends and

⁴¹ Arnold J. Bauer. "The Church in the Economy of Spanish America: *Censos* and *Depositos* in the Eighteenth and Nineteenth Centuries," *Hispanic American Historical Review* 63 (1983): 707. See also Irving A. Leonard, *Baroque Times in Old Mexico* (Ann Arbor: University of Michigan Press, 1959) 221.

developments. Although the mother country sought the greatest possible return on its investment, from bad government in Iberia came ineffectual administration vis-a-vis exploitation of the colony. Administrative inertia smothered all the elements promoting exploration discussed earlier. The Conquistadores had been supplanted, on the one hand, by settlers, and on the other hand by lack of success i.e., they found neither bullion nor healthy adventure on the Northwest coast. Additionally, in keeping with colonial policy, Spanish officials who had little interest in continuing such voyages usurped the power of these individuals, as for example, when Viceroy Mendoza supplanted Cortes in 1535. Even the Roman Catholic Church contented itself with modest advances into the northern frontier. When Charles II, 'El Hechizado,' the bewitched, died heirless in 1700 a decade-long struggle ensued for control of the Spanish throne and a new age dawned.

THE WAR OF THE SPANISH SUCCESSION

Although the great powers of Europe grappled in the War of the Spanish Succession for the right to determine who would replace Charles II as Spain's monarch, for the purposes of this study it need not be afforded much detail. Certain salient elements are important, however, because the new royal family returned Spain to near greatness, and re-established the Spanish presence on the Northwest coast.

Two would-be Spanish kings vied for position as death hovered about the bed of Charles II: Archduke Charles of Austria, younger son of the Holy Roman Emperor Leopold; and Felipe of Anjou, grandson to Louis XIV of France. Charles, in one of his more cogent moments willed his throne to the capable Felipe, a decision duplicated by Louis XIV. England, startled by the prospect of facing a united front of France and Spain that this succession would engender, went to war to prevent it, and received support from Austria, The Netherlands, Portugal, and some small German states. The fighting began in 1702, continued until 1713, and officially ended with the Treaty of Utrecht.⁴²

While the House of Bourbon garnered the Spanish throne, Britain gained major trade concessions in the Spanish Indies (known as the *Asiento*), a guarantee that the royal houses of Spain and France would not unite under Felipe and, additionally, England gained the strategic outpost of Gibraltar. Moreover, another treaty concluded the following year gave away what possessions Spain still held in The Netherlands, while Austria received lands in Italy. Yet remarkably, the Spanish House of Bourbon would rally to overcome these and other formidable obstacles.

⁴² Anthony H. Hull, *Charles III and the Revival of Spain* (Washington: University Press of America, 1981) 1-2.

CHAPTER II

RETURN TO THE NORTHWEST COAST

The first three expeditions to the northwest coast in the eighteenth century sailed during the reign of the Bourbon monarch Carlos III (1759-1788), who has been considered one of Spain's most illustrious monarchs. Under the aegis of the so-called Bourbon Reforms, his far-sighted policies returned Spain to near greatness through continued centralization of government, improved efficiency, and bolstered defenses. In New Spain the successful implementation of royal policies and desires required especial competency in two key positions. First, the accomplishments of Visitador Jose de Galvez represent the manifestation of the Enlightened philosophies guiding Carlos's thinking; and, second, the viceregal administration of Antonio Bucareli illustrates the critical performance expected of a viceroy.

Galvez's service to the crown punctuated Carlos's reign, initially as visitor-general to Mexico (1765-1771), and later as Minister to the Council of the Indies (1776-1787), the Spanish body responsible for colonial administration.¹ Galvez's unyielding desire to ensure that

¹ Since its inception in 1524 the Council of the Indies had directed the Crown's affairs in the Americas. It reached the nadir of its power in the sixteenth century, after which

the crown's policies be adhered to, as well as his own recommendations for improvements, necessitated that he be involved with planning the expeditions to the northwest coast.

Incorporated into the consequent roles of Galvez and most intimately tied to the exploration is the period 1771 through 1779 during which Antonio Bucareli served as viceroy of Mexico, and during which the voyages were launched. Eulogized as an exemplary viceroy, Bucareli in fact planned and directed the expeditions.

The *raison d'être* of the voyages of the 1770's can best be understood by first examining salient elements of the reigns of the eighteenth century Bourbon monarchs. The achievements of Galvez, Bucareli, and the importance of several influential apocryphal voyages likewise serve to illustrate the causal agents that engendered the Perez (1774), Hezeta-Bodega (1775), and Arteaga-Bodega (1779) expeditions.

BOURBON KINGS

When Felipe V (1700-1746) assumed the throne in 1713 following the War of the Spanish Succession he inherited a nation in shambles. The economy, always sluggish and inefficient in wholly lethargic Hapsburg hands, had been devastated by the demands made on it by the conflict. Trade

its influence declined steadily, if slowly. See Mark A. Burkholder, "The Council of the Indies in the late Eighteenth Century: A New Perspective," *Hispanic American Historical Review* 56 (1973): 404-05.

with the colonies earlier fell short of its potential because of the restrictive monopoly systems but, as a result of the war, Spain lost a substantial share of its economic sovereignty due to trade concessions and debts incurred to fund the conflict. Further, Spanish military preparedness had declined precipitously, until it was represented at sea--the nation that had launched the mighty Armada of 1588--by a puny naval force of 20 warships. Equally telling, the spirit of the infantry had been so broken and the incentive to fight had become so negligible from endemic Spanish losses that troops often ran away from battle.

Undaunted and with vigor, Felipe took up the challenge to rebuild the Iberian nation. He ruled over a truly Spanish--and consequently more manageable--empire, consisting of the kingdoms of Castile, Aragon, plus possessions in the New World. His first reform measure sought to reduce interlopers' penetration of the colonial economies. The Treaty of Utrecht (1713) had exacerbated the smuggling problem by the *Asiento* giving Britain a foothold in Spain's New World slave trade, and the right to send one annual shipload of merchandise to the colony. Smugglers capitalized on both concessions, using the sanctioned trade network as a thinly guised conduit for contraband. Spain responded by commissioning privateers to patrol New Spain's Atlantic coastline in search of illegal vessels, which led to war with Britain in 1739. Related to his first Bourbon reform policy, Felipe's second policy attempted to revive

the torpidly slow flota system, an easy and oft targeted spoil for interlopers. But by engaging British nationals in combat the Spanish privateers further roused the island nation, and in 1740 Spain temporarily suspended the flota system after losing the war.

The ultimate solution addressed the problems in two ways. On the one hand, Spain replaced the ponderously slow and difficult to defend galleons with newer, lighter, and much quicker vessels which typically sailed singly. And on the other hand, when danger appeared to be minimal the crown simply re-established the flota system.

Felipe made no attempt to re-structure colonial administration, but rather sought to improve it through a process stressing increased centralization, and by improving the quality of officials. The Crown, for example, largely eliminated the sale of offices to the highest bidder without regard to qualification.² Other administrative improvements included moving the official port from Seville to Cadiz,³ a better, more efficient harbor, and doubling to two the

² Despite opposition from the Council of the Indies, Bourbon monarchs, always in need of revenue, never completely abandoned the Hapsburg practise of the widespread sale of powerful and prestigious offices. See Mark Burkholder, and D.S. Chandler, "'Creole Appointments and the Sale of Audencia Positions in the Spanish Empire under the Early Bourbons, 1701-1750.'" *Journal of Latin American Studies* 3-4 (1971-72): 187-206.

³ Seville's proximity to Spanish agricultural lands, which stocked vessels sailing to the New World, had traditionally disadvantaged the superior harbor site of Cadiz. Lovett, 84.

annual number of ships allowed to trade between Manila and Acapulco.

This first Spanish Bourbon monarch stumbled badly in international affairs, frequently involving Spain in armed conflicts, especially with Britain; and, with similar frequency, losing. Galvez's biographer, Professor Herbert I. Priestley, attributes Felipe's diplomatic troubles to three things: Felipe's blind desire to regain title to the French throne; a desire to re-gain Minorca and Gibraltar; and, the desire of his wife, Isabel Farnese,⁴ to establish her sons in Italy.⁵

On Felipe's death in 1746, Fernando VI, the second but only surviving son of his first marriage came to the throne at the age of 33. Less aggressive than his father, Fernando's only substantive achievement seems to have been to continue the former's policies, with the notable exception of keeping Spain out of costly wars. Thus, the Iberian nation would "enjoy fourteen years of much-needed peace, during which the improvements introduced by Felipe (i.e., further centralization of power and increasing mercantile efficiency) took firm root,"⁶ but during

⁴ Isabel's considerable influence on the king has been attributed to Felipe's insatiable sexual appetite. The result: "Philip was at the same time the tyrant and the slave of the woman he loved." Charles Petrie, *King Charles III of Spain, An Enlightened Despot* (London: Constable and Co., 1971) 3.

⁵ Herbert I. Priestley, *Jose de Galvez, Visitor-General of New Spain (1765-1771)* (Berkeley: University of California Press, 1916) 14-15.

Ferdinand's tenure colonial policy and administration changed little.

The reign of Fernando's half-brother, Carlos III, who ruled from 1759 till his death in 1789, achieved an opposite effect and returned Spain to near greatness. A series of far-sighted policies revived the imperial economy, both at home and in the colony, and defenses were bolstered on every shore. While one must not exaggerate Carlos's successes--the essence of mercantilism survived, and Spain was inexorably eclipsed by European rivals--for a brief time his policies narrowed the ever widening gap.⁷ For a significant part of Carlos's reign one key figure, Jose de Galvez, served the Crown both in New Spain as visitor-general (1765-1771), and in Spain as Minister of the Indies (1776-1787).

VISITOR-GENERAL JOSE DE GALVEZ

The visitador's functions and responsibilities were clear, according to Haring:

Visitas were of two sorts, which may be called specific and general. The former applied to a single official or province; the general visita was an inspection or investigation of an entire viceroyalty or captaincy general. Everything came within the purview of the visitador-general, from the conduct of viceroys, bishops and judges to that of the local parish priest; although when a

⁶ Bernard E. Bobb, *The Viceregency of Antonio Maria de Bucareli in New Spain, 1771-1779* (Austin: University of Texas Press, 1962) 13.

⁷ In a well researched study, Jose Cuello traces Bourbon reform measures in a localized setting. "'The Economic Impact of the Bourbon Reforms and the Late Colonial Crisis of Empire at the Local Level.'" *The Americas* 44 (1987-88): 301-23.

viceroy was included in a visita it was only in his capacity as president of the audiencia [the chief administrative body in the colony]....⁹

Galvez's visita was of the general type, and he is universally hailed as a visitador without equal. Rising from the lowly station of shepherd boy, he served energetically and usually successfully, even though suffering a bout of madness in 1769.¹⁰

Trained as a lawyer, and appointed visitor-general February 20, 1765, his orders from the king, in part, read:

...you may, in the capacity of visitor-general of all the branches, revenues, and duties, which in any form appertain to my real hacienda [public finance] within the jurisdiction of the kingdom of New Spain, take cognizance of all of them, examine their proceeds, expenses, balances, and the whereabouts of their funds; demand any arrears in which the administrators, treasurers, lessees of revenues, or other persons who have managed rents, may be to my real hacienda; and regulate the system and management with which the revenues are to be administered in future, reducing expenses and salaries which can and ought to be lowered or abolished, so that the balances be not dissipated by unnecessary expense, but made more effective to their destined ends.¹⁰

⁹ Haring dates the first visita to 1499, an investigation of the government of Christopher Columbus. Intent on unseating Viceroy Mendoza, Cortes in 1540 apparently persuaded the Council of the Indies to employ a visita to investigate his arch-rival, but it came to little effect. Haring, 142-43.

¹⁰ The pious and proper visitador became irrational during his tour of the northern provinces in 1769-70. Apparently, so powerfully did the fears of Russian encroachments play upon his mind that he suffered wild delusions, imagining himself, variously, to be the king of Prussia, Sweden, the pope, and St. Francis of Assisi. Within months he recovered completely. See Cook, 53-54.

¹⁰ For a translation of the full text of the royal instruction Jose de Galvez received, see Priestley, 404-12.

Galvez arrived in New Spain on the heels of Carlos's many orders designed to revitalize the Imperial and colonial economies. The sequence is important, because although the Crown hoped to invigorate the colonial economy, the underlying premise always concerned the welfare of the mother country. His initial plans centered on establishing a government tobacco monopoly from which Spain might re-coup financial losses it suffered in the Seven Year's War (1756-1763), in which Spain lost Florida and almost lost Cuba; rooting out corruption, for example, by reforming the customs house at Veracruz; and, most importantly, bolstering defenses on the northern frontier.

Galvez established the tobacco monopoly almost immediately after his arrival, during the viceregency of the Marques de Cruillas. An early failure, the corporation thrived after 1766 when Carlos Francisco de Croix replaced Cruillas, whom Galvez did not like.¹¹ The collection of customs duties had been the prerogative of certain contracted parties since the 1500's but Galvez returned the service to colonial administrators as contracts expired. Moreover, the Council of the Indies adopted his recommendations and opened additional, competitive ports at Campeche and Yucatan.¹²

¹¹ See Priestley, Chapter IV, "Galvez and Cruillas--The Tobacco Monopoly," 135-71.

¹² Priestley, 202.

Frontier fortification is best seen in the light of expulsion of the Jesuits from all Spanish dominions in 1767. Carlos III issued the order in part because the Society of Jesus represented the most obvious challenge (with significant symbolic overtones) to the "'Enlightened Despotism'" of the Bourbons. In Lesley Byrd Simpson's words, "'The Jesuits had become too powerful for their own good.'" ¹³ Additionally, certain powerful, anti-clerical officials convinced the king the order planned to depose or kill him. ¹⁴ Yet the push northward either by sea or by land always stemmed at least in part from proselytizing imperatives, and so an effective defense of the frontier meant essentially to defend the manifestation of the very institution (the Church) whose prerogatives the Crown sought otherwise to subordinate to its own, more secular interests!

Galvez began a first inspection tour of the frontier provinces in April of 1767. The situation at the presidio of El Paso in 1765 typified the dangerous and frequently chaotic conditions. Guarded by fifty men, over whom a captain wielded supreme military and civil authority, ¹⁵ the

¹³ Lesley Byrd Simpson, *Many Mexicos* (Berkeley: University of California Press, 1941) 200.

¹⁴ Engstrand, 440.

¹⁵ A number of specific actions dealt with the northern frontier problems. Most importantly, Galvez capitalized on the opportunity Julian de Arriaga's death left him in 1776, replacing him as Minister of the Indies and initiating a proposal that re-structured New Spain administratively by establishing a whole new sub-viceroy. Under the plan several northern province were removed from the jurisdiction of the viceregent and placed under the command of a captain-

overriding concern involved defense against hostile Indians, whose lands they had invaded. In his diary the outpost's commander, Jose de la Fuente, appeared to be totally preoccupied with "the enemy Indians." During the month of September he recorded:

On the twentieth the Apache Indians stole twenty-one head of cattle belonging to don Alonzo de la Cadena, a citizen of Chihuahua. Of these they made off with nine, while the other twelve were taken away from them by five Indians of the village of Senecu [about five miles southeast of Ciudad Juarez] who were out hunting. Two of the animals died of wounds received by the Apaches.¹⁶

During September and October of that year Fuente reported a net loss of 18 oxen, 21 cattle, and an undisclosed number of mules to Indian thievery. The Spanish retribution netted six dead Indians, and seventeen taken prisoner.¹⁷

Just two days out of Guadalajara Galvez received a communique from Spain's Secretary of State, the Marques de Grimaldi, via Viceroy de Croix, instructing him to take immediate action to counteract recent Russian encroachments toward California. Galvez interrupted the northward

general, who represented the Crown directly, and acted both as supreme civil and military authority. The premise was simple: to relieve the viceroy from nagging problems on the frontier that might be better addressed by a military man. Bucareli's strong opposition delayed its implementation until 1776. See Charles Edward Chapman, Chapter XXV, "The Commandancy-General of the Frontier Provinces," *A History of California: The Spanish Period* (New York: Octagon Books, 1928) 316-29.

¹⁶ Jose de la Fuente, "Diary of Pedro Jose de la Fuente, Captain of the Presidio of El Paso del Norte, August-December, 1765," trans. James M. Daniel, *Southwestern Historical Quarterly* 83 (1979-80) 259-78.

¹⁷ Fuente, *passim*.

expedition and months later, in 1768, a junta composed of Galvez, de Croix, the archbishop, the judges of the two audiencias (headquartered in Guadalajara, and Mexico City, respectively) and other important officials, met to address the royal concerns. Priestley cites eight problems the junta sought to redress, including such things as counter-productively high export duties, agricultural stagnation due to a lack of black slaves, and lax enforcement of regulations.¹⁸ More to our point, however, the junta very directly expressed concerns with putative Russian encroachments on New Spain's Pacific frontier, and in a joint despatch issued to the Council of the Indies noted:

It is known to our court by the voyages and narratives that have been published in Europe that the Russians have familiarized themselves with the navigation of the sea of Tartary, and that (according to a well-founded report) they already carry on trade in furs with a continent, or perhaps an island ([Alaska]), distant only eight hundred leagues from the Western Coast of the Californias....

Additionally, it continued:

...that from the year 1749....the English and Dutch have acquired a very particular knowledge of the ports and bays we hold on the South coast, especially the peninsula of the Californias; so that it would be neither impossible, nor indeed very difficult, for one of these nations, or the Muscovites, to establish, when least expected, a colony in the port of Monterey.¹⁹

Officials in Spain were cognizant of the Russian danger, having been warned as early as 1761 by the Duke of

¹⁸ Most of the issues were of purely administrative focus. Priestley, 26-31.

¹⁹ Cited in Richman, 65.

Almodovar, Spain's representative in St. Petersburg, that Russian fur-traders had been moving ever nearer Spanish dominions. However, Galvez and de Croix's remonstrations further highlighted the need for action, and prompted the establishment of the Naval Department at San Blas in 1767 and the mission at Monterey in 1769.²⁰

THE NAVAL STATION AT SAN BLAS

Russian north-Pacific exploration and exploitation had been well known for some years, and served to re-activate Spain's sixteenth century fears of foreign meddling on its colonies' western littoral. To that end, the naval station constructed at San Blas in 1767-68, and the settlements established at San Diego and Monterey in 1769 constituted Galvez's response to the Spanish Secretary of State Marques de Grimaldi, Minister of the Indies Julian de Arriaga, and the expressed fears of the junta.

Clearly, any expedition sailing north to Alta California (and beyond) needed a suitable launching port, yet it is somewhat surprising Galvez favored San Blas. Drifting silt deposits frequently rendered the shallow harbor all but unnavigable and, built on a malarial swamp, the climate could be deadly. In short, as Galvez's secretary, Juan Manuel Viniegra, recorded, San Blas 'is almost uninhabitable as a consequence of its scorching

²⁰ See Chapter V, 'Reoccupation of Monterey, and Discovery of the Bay Of San Francisco,' Richman, 62-89.

climate and the host of poisonous insects littering its soil.'²¹

On the other hand, well-sheltered and considerably north of the port of Acapulco, San Blas strategically provided a shorter, more direct route to northern waters. This factor assumed considerable importance when even from San Blas a voyage to the cape of Baja California in a schooner might consume as many as twenty days; in a smaller packet-boat nearly three months might be required.²² Conveniently situated only a short distance from the supply and provincial capital of Guadalajara, naval department personnel might be quartered at nearby Tepic, a community in the mountains Alexander von Humboldt later described as 'salubrious'.²³ Finally, a good, local supply of ship-building timber tipped the balance in San Blas's favor.²⁴

²¹ Cited in Thomas Vaughan, 'Russian, French, British and American Incursions into 'The Spanish Lake','' *To the Totem Shore: The Spanish Presence on the Northwest Coast*, Santiago Saavedra, gen. ed. (Madrid: Ministerio de Turismo y Transporte, 1986): 41.

²² Michael E. Thurman, *The Naval Department at San Blas, New Spain's Bastion for Alta California and Nootka, 1767 to 1798* (Glendale, Ca.: The Arthur H. Clarke Co., 1967) 59. By comparison, a modern crossing by government ferry from Puerto Vallarta to La Paz requires only about 24 hours.

²³ Alexander von Humboldt, *Political Essay on the Kingdom of New Spain*, trans. John Black, vol. 2 (New York: I. Riley, 1811) 149-50.

²⁴ Thurman, *passim*. For a first-hand account recorded in the early nineteenth century, see Humboldt, *passim*.

NORTH TO MONTEREY

Spanish fear of the Russians grew almost exponentially with each new revelation that the Euro-Asians edged ever closer to California. The Russians saw the area as part of their expanding Pacific empire, whereas the Spanish viewed the north coast as nothing more than an extension of California.²⁵ But what resistance had any Russian fur-trader ever encountered from the Spanish who alleged to 'own' it? The answer is, none.

Out of curiosity not unlike Spain's early search for the Strait of Anian Russian explorers sought to discover the geographical relationship between their empire and America. The Cossack Semen Dezhnev, for example, first espied the Bering Sea (the true Northwest Passage) in 1648 when he led a party of ninety men along the Russian coast until it met open sea. Dezhnev unfortunately shared a common fate with the Spanish mariner Ulloa, because the information was neither utilized nor long remembered, and credit for the discovery ultimately went to another, Vitus Bering, a Dane in the employ of the Tsar.

After 1700 Peter the Great renewed Russian interest in Pacific exploration. Several impetuses lured fur-traders north and east toward North America: to emulate other empires meant to explore and to exploit; to seek greater scientific knowledge; to accommodate the demands of 'the

²⁵ Van Alstyne, 187. See also Hubert Howe Bancroft, *History of Alaska, 1730-1885* (San Francisco, 1886) 194-95.

youthful enthusiasm and dreams of the new Russian navy''; and, to augment a dwindling supply of valuable pelts.²⁶ Among the notable Russian explorers who stand out among the many who visited the north-eastern shores of the ''Spanish Lake'' are Bering, and Aleksei I. Chirikov. Although commercially profitless, Bering quite unwittingly led the cartographically successful First Kamchatka Expedition of 1725-1731 into the strait that now bears his name. He also led the Second Kamchatka Expedition of 1733-1742 but died after his ship wrecked on Bering Island. His second, Chirikov, managed to salvage the vestiges of the scurvy-wracked expedition, and completed the voyage--again to considerable cartographical effect.²⁷

As their efforts clearly paid well in furs, Russian excursions to Alaskan shores became more frequent, and established the initial alien presence in the northeast Pacific that so frightened the Spaniards. The Spanish at length responded by settling Alta California. The effort began with a four-pronged thrust in 1768-69, with two parties sailing and two marching overland.²⁸

²⁶ Vaughan, ''The Spanish Lake,'' 25.

²⁷ Vaughan, ''The Spanish Lake,'' 26-28. See also Chapters IV and V, ''Discovery of Alaska,'' and ''Death of Bering,'' in Bancroft's *Alaska*, 35-62, and 63-74, respectively.

²⁸ See Chapter XVII, ''The Spanish Occupation of Alta California,'' in Chapman's *Spanish Period*, 216-231.

BEYOND CALIFORNIA

Despite Spain's efforts in California reports of Russian meddling in more northerly waters continued to circulate and startle the Spanish. By 1773 it had become clear that Spain would adopt additional measures in the 'Lake' before being satisfied that its claims had been secured. Viceroy Antonio de Bucareli, who arrived in New Spain in 1771 after serving six years as governor of Cuba, received orders in 1773 to take further action to circumvent Russian meddling in the northern climes.

Indeed, by 1773 and the warnings issued by Spain's new ambassador to Russia, the Conde de Lacy, expeditions led by Bering's heirs had penetrated the Pacific Northwest littoral southward to 64 degrees North latitude. Further, the count speculated that Russians might invade California,²⁹ and, to that end, Minister of the Indies Arriaga directed Bucareli immediately to take steps to preclude such an event.

APOCRYPHAL VOYAGES

A final factor drawing the Spanish northward again after almost two hundred years of neglect were tales of imaginary voyages said to have discovered the Strait of Anian late in the sixteenth century. The first of three

²⁹ Mercedes Palau, 'The Spanish Presence on the Northwest Coast Sea-going Expeditions (1774-1793),' *To the Totem Shore: The Spanish Presence on the Northwest Coast*, Santiago Saavedra, gen. ed., (Madrid: Ministerio de Turismo y Transporte, 1986): 43.

significant stories is that of Lorenzo Ferrer Maldonado, published in 1609. He claimed to have traversed the strait in 1588 on a course which evokes a striking resemblance to the actual passage. Toward the end of his testimony Maldonado recorded:

To some persons it has seemed impossible to navigate at so high an altitude of the pole;--in answer it may be observed that the Hanseatics live in latitude 72 degrees...Having cleared the Strait of Labrador we begin to descend from that latitude, steering W.S.W. and S.W. for three hundred and fifty leagues, till we arrived in latitude 71 degrees, when we perceived a high coast without being able to discover whether it was a part of the continent or an island, but we remarked that if it was the continent it must be opposite to the coast of New Spain.²⁰

Maldonado's well earned reputation as an informed member of the nautical fraternity buttressed his claim.²¹

The second, and certainly more infamous apocryphal voyage sailed under the command of Juan de Fuca, alleged discoverer of the straits that now bear his name. Although not officially published until 1626 the Fuca tale may have influenced the voyages of Cermenho in 1594 and Vizcaino in 1596 and 1602, as noted in Chapter I. Raised by Professor Warren Cook, this interesting case considers several factors.

First, in building a plausible argument for Fuca's tale Cook argues that if Fuca (actually a Greek baptized

²⁰ Lorenzo Ferrer Maldonado, Appendix No. II, *A Chronological History of Voyages into the Arctic Regions*, by John Barrow, 1873 (New York: Barnes and Noble, 1971) 28.

²¹ Cook, 21.

Apostolos Valerianos) in fact had convinced Spanish authorities that he had found the passageway, both Cermenho and Vizcaino would surely have been privy to the information by virtue of their positions in New Spain. If authorities believed Fuca's tale to be true then it helps explain the flurry of activity on the coast in the period 1592-1602. Moreover, as noted, Spain decided to forego further explorations in part because of the fear that interlopers would exploit the passage. This makes more sense, obviously, if colonial officials held the existence of the passageway to be a demonstrated fact.³² Nonetheless, Cook is ultimately non-committal. He writes:

While it is probable that Fuca was an experienced pilot in Pacific waters, there is no corroboration that he led an expedition to a high altitude in 1592. Yet the absence of confirmation of such a voyage does not remove it from the realm of the possible....The archives of Spain and Spanish America are far from plumbed and may yet provide evidence to prove or disprove Fuca's claim.³³

Wagner, however, from whom Cook borrows heavily, gives the veracity of Fuca's claim no credence, charging, "there is no probability whatever that Fuca or anyone else had discovered this strait."³⁴

Unquestionably, however, the published claim played a role in launching the expeditions of the 1770's. Michael

³² Cook, 25-27.

³³ Cook, 29

³⁴ Henry R. Wagner, introduction, "Fray Benito de la Sierra's Account of the Hezeta Expedition to the Northwest Coast in 1775," trans by A.J. Baker, *California Historical Society Quarterly* 9 (1930): 208.

Lok, financial backer of Martin Frobisher's voyages in 1576, 1577, and 1578, met Fuca in Venice in 1596, and from him recorded a remarkable tale:

...a broad Inlet of Sea, between 47. and 48. degrees of Latitude: hee entred thereinto, sayling therein more than twentie dayes, and found that land tending still North-west and North-east, and North, and also east and South-eastward, and very much broader Sea than was at the said entrance...³⁵

Wagner gives considerable weight to the influence of the third alleged voyage through the Northwest Passage, captained by Bartholomew de Fonte in 1640. Published without fanfare in London in 1708 this tale, in conjunction with the Maldonado and Fuca legends, helped persuade the British House of Commons in 1744 to post a 20,000 pound reward for anyone who could verifiably re-find the passageway.³⁶ Not surprisingly, this act did not go unnoticed in Spain, although several decades would pass before the Iberian nation would be moved to action.

It may be observed that the various influences prompting the 1770's expeditions essentially mirrored the impetuses behind the voyages of the late sixteenth and early seventeenth centuries. Obviously, however, their respective weights had changed. While it may be held as axiomatic that always a lust for riches and adventure fueled the actual voyagers, this proved to be less true for colonial officials

³⁵ Cook, 540. A full transcription of Michael Lok's Fuca tale is presented in Cook, 539-43.

³⁶ Cook, 30.

in the late eighteenth century than it had been in the sixteenth century.

The Crown sought first to protect territory it considered to be unequivocally Spanish, and that specifically entailed defense against encroachments by Russians, Britons, interlopers, or any potentially disruptive agent(s). As a corollary to this a desire to find the Strait of Anian re-surfaced. As it had been demonstrated to official Spanish satisfaction in the sixteenth century that no easily accessible source of wealth could be gained from the north coast and hence no compelling economic motive to continue searching the coast existed, it was equally true that Spain's New World Pacific shores were vulnerable if such a passage could be found. As a result, Spain felt that no discovery better served its interests than a well publicized discovery; but, conversely, if locating the passage was inevitable then Spain logically wanted to arrive first.³⁷ Similarly, alleged voyages of the late sixteenth and early seventeenth centuries and an intense British desire to find the Strait of Anian also served to spark the new Spanish interest in Pacific Northwest exploration and exploitation.

³⁷ Wagner, 'Sierra's Account,' 202.

CHAPTER III

UNDER BUCARELI'S DIRECTION

Placed in an eighteenth century context, the re-emergence of the various sixteenth century impetuses behind the Spanish voyages to the northwest coast led to the deployment of new expeditions in the 1770's. Spanish fears, especially of Russian encroachments into the Pacific Northwest, festered early in the decade, forcing Spain to react. Viceroy Bucareli surveyed and directed plans to thwart the perceived foreign threats, and to establish a definitive, legally tenable Spanish claim to the littoral.

Antonio Maria Bucareli y Ursua, the 46th viceroy of New Spain, arrived at the port of Veracruz August 23, 1771, ready to take up his new duties. Although his transfer from Cuba disappointed the deeply conservative viceroy, Bucareli's character was such that he embraced duty as a passion.¹ His energies, as a result, ensured a cordial relationship with the hard-working visitador, Jose de Galvez, who stayed on several months after Bucareli's arrival to familiarize the new viceroy with the workings of

¹ Bucareli wanted to return to Spain in 1770. "Five years is as much as a man can serve well in America," he wrote to a friend. Cited in Bobb, 20.

colonial administration and the efforts he had made to improve them.

Bucareli's biographer, Bernard Bobb, attributes the viceroy's initial hesitancy in office to a typically cautious attitude magnified by unfamiliar surroundings.² As with his predecessor Carlos Francisco de Croix, the new viceroy faced hostile Indians on the northern frontier, a meager budget with which to administer the colony, and pressures to increase revenues for the mother country. Still, many authors have heralded his successes. He balanced an endemically unbalanced budget,³ and oversaw some of New Spain's most productive years as the world's largest producer of silver.⁴

Bucareli obtained full awareness of earlier warnings about Russian designs on the northwest coast, possibly on California. Until 1773, however, no action he took impacted on the new California settlements or arose from the knowledge that Russians might attempt to overrun the outposts. Several views attempt to explain the viceroy's apparent inertia. Noted scholar Charles Edward Chapman

² Bobb, 131.

³ Bobb singles out Bucareli's financial wizardry as his greatest achievement. However, he stresses that no fundamental reorganization or re-structuring of the colony occurred during Bucareli's tenure; rather, in good Bourbon fashion the viceroy simply tightened lax adherence to regulation. Bobb also insists Galvez should share in this glory. See Bobb, 209-11.

⁴ See Bobb's chapter, "The Mexican Mining Industry," 172-204.

writing in the 1920's calls Bucareli "'the greatest hero who has ever appeared in the field of California history,'" and argued that the viceroy simply needed a settling-in period at his new post before his greatness could blossom.⁵ But one must be cautious with Chapman's opinions, for he later marshalls evidence of a very questionable nature. For example, to complement his glowing admiration of Bucareli, he writes: "'One need only glance at the full name and the titles [a total of 23] of the new viceroy to realize that he was a man of more than ordinary distinction.'"⁶

Professor John Caughey observes several factors influencing the viceroy. First, he says, the viceroy's simple ignorance of the situation changed when Fray Junipero Serra, president of the California missions, visited Mexico City in 1773 and beseeched Bucareli for support. Serra's plea moved the deeply pious man viceroy. Second, he cites Captain Juan Bautista de Anza's proposal to secure an overland route to the California missions as influential. Third, Caughey argues, perhaps "'most influential was his (Bucareli's) realization of the strategic value of the Spanish outposts in California.'"⁷

Bobb, whose biography of the viceroy is not unkind, scoffs at both Chapman and Caughey's assertions, charging "'the projects'"--and he includes Anza's expeditions--"'did

⁵ Chapman, *Spanish Period*, 242.

⁶ Chapman, *Spanish Period*, 269.

⁷ Caughey, 137-38. See also Bobb, 162-63.

not originate with the viceroy'' at all. ''In fact, during his entire viceregency Don Antonio was the source of very few original concepts.'' Bobb argues that Bucareli did little more than follow orders from Spain or take action on the suggestions of Galvez.⁹ Most recent scholarship generally accepts Bobb's conclusion. California historian C. Alan Hutchinson, for example, suggests that ''official'' hands almost exclusively guided Bucareli's actions.¹⁰ Nevertheless, when in 1773 new reports of Russian encroachments arrived from Spain it was Viceroy Bucareli who signed the orders sending an expedition north.

THE JUAN PEREZ EXPEDITION

In July of 1773 Bucareli instructed Juan Perez, chief navigator at San Blas, to draw up and submit plans for an expedition to reconnoiter the northwest coast. Chosen specifically because he had the most experience of any in the department, Perez had been stationed at San Blas since 1767. Although he never rose higher in station than the rank of ensign (pilot first-class) Perez, recorded Bucareli, was ''the only person with sufficient experience and service in the Department of San Blas to undertake the commission.'' ¹¹

⁹ Bobb, 164.

⁹ Bobb, 270.

¹⁰ C. Alan Hutchinson, *Frontier Settlement in California, 1769-1835* (New Haven: Yale University Press, 1969) 1-43. See also Richman, 62-89, and Cook, 41-84.

¹¹ Bucareli to Arriaga. Cited in Thurman, 78-79.

A veteran of the Manila Galleon service, Perez piloted one of the initial vessels to visit Monterey in 1768-69. He was also the first Spaniard of the eighteenth century to enter both the port of Monterey and the port of San Diego. Additionally, according to one account, he saved the Alta California missions from imminent starvation in 1770.¹²

Perez's detailed plans demonstrated a thorough knowledge of the Pacific. Four central points can be delineated: the voyage should be undertaken in the newly constructed frigate *Santiago*; the voyage should be launched in either December, January, or February; a year's supplies should be taken; and, crew members should be recruited in part from the California presidios.¹³ Bucareli, in turn, then relayed his proposals to Minister Julian de Arriaga in Madrid. Upon learning of the plans Carlos III ordered the assignment of six new naval officers and a new pilot to San Blas, and gave full support to the Perez expedition.

Perez received secret orders December 24, 1773, directing him "to ascend to the latitude which he considers suitable, keeping in mind that the landing is to be made at 60 degrees of latitude." He was then to reconnoiter the coast, "never losing sight of it," and to explore it as opportunity presented itself without, however, attempting any permanent settlement; and, as landings occurred

¹² Donald C. Cutter, ed., *The California Coast: A Bilingual Edition of Documents from the Sutro Collection* (Norman: University of Oklahoma Press, 1969) xvii.

¹³ Thurman, 120.

possession was to be taken in the name of Carlos III with a cross being erected beneath which a buried bottle would contain supporting documentation.

In the event that foreign settlements be detected, Perez should avoid contact and sail north to accomplish his duties. Were contact with foreigners unavoidable he should conceal the purpose of the voyage. The expedition was also charged with investigating the commercial potential of the north, to search for "spices, drugs or aromatics, wheat, barley, corn, beans, chick-peas....precious stones or articles which our nation considers valuable."¹⁴ Indians were to be treated kindly if encountered: six-hundred forty-eight bundles of beads and cloth were included for the purpose of ensuring good relations with the native Americans. Finally, Bucareli instructed Perez to deliver provisions to Monterey.¹⁵

At midnight January 24, 1774, the *Santiago* set sail with a crew of 86.¹⁶ In keeping with normal practise the vessel launched itself well into the Pacific to avoid relentless southwest ocean currents. To sail north meant, in effect, to veer in a wide arc generally northwest then

¹⁴ Manuel P. Servin, trans., "The Instructions of Viceroy Bucareli to Ensign Juan Perez." *California Historical Society Quarterly* 40 (1961): 240-41.

¹⁵ Servin, 239.

¹⁶ Bucareli was took no chances that illness or other deprivation might waylay the intentions of the Crown--the ship's complement registered fully twenty-two more than capacity. Thurman, 127-28.

follow the ocean currents southward along the coast. Despite orders not to stop until Monterey (and there only briefly) Perez lay anchor in San Diego in mid-March to repair a leak sprung in the hull.¹⁷ While Fray Serra disembarked March 13, the vessel only turned north again April 5. On May 8 the *Santiago* landed at Monterey to unload supplies where the expedition's two chaplains, Fray Tomas de la Pena and Fray Juan Crespi, came aboard.

After another month-long layover the vessel set to sea June 11, but calm seas prevailed for weeks and the expedition made scant progress until July. Edging ever northward, the prevailing weather brought rain, fog, and increasingly cold temperatures. Fray Pena recorded a typical entry in his July diary:

At dawn on the thirteenth the wind continued at west-northwest, although it was not so strong, and the sky was clear as during the night, but at seven o'clock it was overcast again. At noon it cleared, and the navigating officers got an observation in 48 degrees 55 minutes north latitude....During the afternoon the sky became overcast again. About seven o'clock the wind hauled to the southwest, very fresh, and the course was changed to the northwest. At that hour so thick a fog came on that barely the prow of the ship could be seen and it was so wet that it seemed to be raining. Thus it continued...¹⁸

On the 15th Perez decided to steer toward the coast with the intention of making a necessary landing to replenish dwindling water supplies.¹⁹ The voyage continued,

¹⁷ Thurman, 128.

¹⁸ Servin, trans. 151.

¹⁹ Palau, 46.

then, sighting and baptizing the Queen Charlotte Islands in the name *Santa Margarita*. Native-Americans engaged the voyagers in friendly, if unintelligible, discourse and, although only two saw fit to board the vessel, surrounded the *Santiago* at one point with 21 canoes.²⁰ Finally, at a North latitude of 55 degrees Perez, having failed to land anywhere on the coast and take possession in the name of the Crown as instructed, turned the *Santiago* around and headed south.

On August 8, 1774, the *Santiago* dropped anchor off Nootka Sound, 'a place which it seemed ideal to claim.' Indians paddled out in large canoes and eagerly traded with the Spanish sailors. Forthwith, the ensign organized and launched a shore party, but, he recorded in his journal:

As I was preparing to set out for land, the West wind suddenly arose so fiercely that in an instant the sea swelled in such a way as to cause alarm. The anchorage, which extended four or five leagues out to sea, was unlevel, and the wind such to perturb the sea. In the light of this unexpected occurrence, and the fact that the frigate was dragging the anchor and heading rapidly onto the coast, I deemed it necessary to cut the cable and set sail lest we all perish.²¹

Continuing, the voyage encountered nine weeks of miserable weather and, as scurvy ravaged the crew, on September 27 the *Santiago* at last cast anchor at Monterey. After a recuperative layover the vessel left port October 9 and Perez and his crew landed safely at San Blas November 3.

²⁰ Bancroft, *Northwest Coast*, 154.

²¹ Cited in Palau, 46.

The ensign immediately forwarded the ship's logs to Bucareli in Mexico City, apologizing for having not fully completed the orders given him. Bucareli nonetheless congratulated Perez for "although everything desired and planned for had not been achieved, the information obtained was of value and extended knowledge to an extent which would make sailing to higher latitudes easier."²² Bucareli expressed similar sentiments to Minister Arriaga in Madrid, and noted immediate plans for a second voyage--an expedition that Perez would not lead, but would instead be relegated to second-in-command of the pilot vessel.

THE HEZETA EXPEDITION

Lieutenant Bruno de Hezeta and five other officers despatched from Spain to San Blas by Carlos III arrived at the naval department in the early fall of 1775. Bucareli commissioned Hezeta to lead the three-vessel expedition, the instructions for which largely duplicated those given to Perez except that a latitude of 65 degrees North rather than 60 was sought. The second vessel, the schooner *Felicidad* (more commonly known by its alias, *Sonora*) would be captained by Juan de Ayala, seconded by Juan Francisco de la Bodega y Quadra, and steered by Antonio Mourelle.²³

²² Cited in Palau, 47.

²³ Mounting just two sails and scarcely 36 feet in length, the second vessel gave the expedition three added capabilities: to be able to explore the shallow details of the coast where the larger ship could not enter; to add maneuverability in tight spots where the vessels had been

Accompanying the larger vessels the packet-boat *San Carlos*, captained by Miguel Manrique and seconded by Jose de Canziales, had orders to break off and explore San Francisco Bay.

Almost immediately after the vessels set to sea March 16, Manrique went quite mad. Imagining his person to be in considerable danger, he armed himself with any number of pistols to ward off would-be assassins. Having brought the situation under control, Hezeta transferred Ayala to the *San Carlos* to take over Manrique's command and returned the unfortunate officer to San Blas, temporarily delaying the mission. In Ayala's absence command of the *Sonora* fell to Bodega; and the vessels were re-launched from San Blas March 19.

Progress proved fitful. Although the *San Carlos* broke away March 25 to explore San Francisco Bay, contrary weather actually blew the vessels south of the latitude of San Blas, and not until late May did they pass the latitude of Monterey. In early June the expedition dropped anchor at Trinidad Bay, California, at North latitude 41 degrees 03 minutes, roughly between Cape Mendocino and Cape Blanco. And on June 11 a shore party took possession in the prescribed manner. Amongst a crowd of seamen and friendly native-Americans, Fray Palou recorded:

...the Father preacher Fray Miguel de la Campa sang the Mass, during which many of those who had

instructed to reconnoiter; and, the smaller vessel would make shore landings and possession taking easier for the former two reasons. See Thurman, 145, 149.

landed took communion. In the Mass the father gave his talk, exhorting them all to continue the voyage cheerfully until the desired purpose should be attained.²⁴

Additionally, the crew erected a cross and beneath it buried a bottle with attendant documentation.

July 13, 1775, the vessels dropped anchor near Point Grenville, Washington. The flagship's crew engaged the native-Americans in friendly discourse, trading and bartering, while the schooner some miles north launched a shore party to find fresh water. The six sailors Bodega deployed on shore were caught unawares by hostile Indians and "torn in pieces," as was the launch.²⁵ In retaliation Bodega's crew opened fire on some of the Indians' canoes near the ship, and killed several of the occupants. Bodega wanted to deploy a larger shore party to exact a more substantive vengeance but a council of the expedition's officers dissuaded him.

The council also discussed the advisability of sending the *Sonora* back to Monterey because of her small size--but Bodega and Mourelle insisted on completing their mission. Said Bodega of his vessel:

...there is no hiding her small size, bad steering, frailty, slowness, and the fact that I am forced to give more sail than should be necessary. All these reasons...should have been brought to his Excellency's notice by those responsible, informing him of the danger her

²⁴ From the journal of Fray Palou. Cited in Thurman, 153.

²⁵ Bancroft, *Northwest Coast*, 161.

attributes constitute. However, what is done is done, and no fear will stand in our way.²⁶

Setting out to sea directly westward on the 14th, by the 19th Perez advised that because of sickness (scurvy), ill winds, and given the lateness of the season, the expedition turn southward. Again, Bodega and Mourelle protested, and Hezeta, relenting to their pressure, ordered the expedition to continue.

Then, as is perhaps well known, in the pitch of night July 31 the schooner and her flagship separated. Mourelle recorded:

On the 31st it continued to be so dark that even during the day we could not see the frigate.

On the 1st of August at day-break we had the same dark weather, so that we could not distinguish at half a league's distance, nor had we sight of the frigate: we kept on however...²⁷

Bodega apparently wasted no time in determining the Sonora's course of action:

At dawn...I resolved, in pursuance of my instructions, to continue the explorations alone, even though I took into consideration the advanced season, and the shortage of water.²⁸

²⁶ Cited in Palau, 50.

²⁷ Mourelle, Francisco Antonio, "Journal of a Voyage in 1775," Trans by Daines Barrington. *Voyage of the Sonora in the Second Bucareli Expedition to Explore the Northwest Coast...1775* by Daines Barrington (San Francisco, 1920) 501.

²⁸ Juan Francisco de la Bodega y Quadra, *Expeditions in the Years 1775 and 1779 towards the West Coast of North America*, trans. G.F Barwick. (Provincial Archives of British Columbia, Victoria, B.C.) 3-4.

Also within hours of the parting, at latitude 46 degrees 42 minutes North, the officers on the *Santiago* decided to head south for the very reasons earlier complained of by Perez.

First sailing north to 49 degrees 30 minutes--''in the region of Nootka,''--the *Santiago* turned southward following the shore.²⁹ On August 17 Hezeta became the first European to espy the Columbia River. Continuing, the vessel at length entered the harbor at Monterey August 29, and put ashore 35 men afflicted with scurvy, one of whom did not survive.

Bodega meanwhile, apparently with full support from his crew continued northward, reaching a North latitude of 58 eight degrees on two occasions, and taking possession twice in the name of the Spanish Crown. September 8, with a crew so wracked by scurvy that most were functionally incapable of carrying out their duties, the tiny vessel headed south. Recorded Bodega:

...seven men were discovered with scurvy, some at the mouth and others with various pains which impeded the movement of their legs, from which circumstances there remained only two men in each watch, one of whom was indispensable for handling the rudder.

...I knew it would be impossible even though I exerted myself to sail further north to a higher latitude. And even the return trip would be doubtful if the winds freshened vigorously, seeing we did not have enough men to handle the ship, and therefore I resolved to return....reconnoitering the coast whenever I found it possible.³⁰

²⁹ Bancroft, *Northwest Coast*, 162.

³⁰ Cited in Thurman, 160. See also Mourelle's account in Barrington, 511-12.

Conditions on board so deteriorated because of the sickness that both Bodega and Mourelle found it necessary to pitch in and help with the necessary, mundane sailing chores just to keep the ship afloat.

After reaching Monterey October 7, and as soon as the men had sufficiently recovered, both vessels left for San Blas. On November 10, just two days out of Monterey, Juan Perez died.

ARTEAGA AND BODEGA

Even before the Hezeta expedition had returned to San Blas, Bucareli busily planned another foray. He directed Lieutenant Ignacio Arteaga and Francisco Hijosa, shipping master at San Blas, to draw up plans including provisions for fully arming the next expedition. International events, however, temporarily sidelined the project. The revolution in Britain's American colonies drew both France and Spain's attention elsewhere, and Madrid indefinitely postponed the next expedition.

The northwest coast, however, received other visitors in the Spanish absence. In search of the elusive Strait of Anian, and following orders very much like those of Juan Perez, in the early spring of 1778 Great Britain's illustrious Captain James Cook reconnoitered the northwest coast. Directed to survey the coast between 45 degrees and 65 degrees North latitude, to avoid any Spanish settlements, and, fully aware of the 20,000 pound reward for finding the

northwest passage, to take possession in the name of the British Crown wherever possible.³¹ Importantly, he landed at Nootka Sound, and his crew conducted considerable trade with the Indians there. Although Cook did not survive his third famous voyage, his published journals appeared in Europe in 1784 to considerable effect, and in marked contrast with the secrecy of Spanish expeditions.

By 1778 Bucareli's plans for another Spanish expedition resumed. Two new frigates were stocked and readied for service, with Arteaga leading the expedition from the flagship *Princesa*, seconded by Lieutenant Fernandez Quiros, and with Bodega and Mourelle occupying similar positions on the second vessel, the *Favorita*. On February 11, 1779, the expedition sailed, the *Princesa* with a crew of 98 and the *Favorita* with 100. Instructions again largely duplicated those given to Perez, with two exceptions. First, Bucareli ordered the heavily armed expedition to attain a North latitude of 70 degrees; and, second, to arrest James Cook, if encountered.

Sailing north, and not nearing the coast until Alaska, the vessels did not land between 42 degrees and 55 degrees North latitude, and they visited California only on the route south. The vessels dropped anchor off the Alaskan coast in early May where a landing party gathered water,

³¹ Bancroft, *Northwest Coast*, 168-69. See also Barry M. Gough, "The Northwest Coast in Late Eighteenth Century British Expansion," *Western Shore*, ed. Thomas Vaughan (Portland: Oregon Historical Society, 1976) 52-53.

firewood and ballast. From there the crews mapped shores, inlets and bays, and took possession in the name of Carlos III. While the native-Americans received friendly treatment, Arteaga and Bodega took precautions to avoid a recurrence of the massacre during the Hezeta expedition.

The expedition also gathered much valuable ethnographic information, as Bodega noted in his journal:

They cover their heads with hats well woven from the inner bark of a tree, and shaped like a funnel. On their wrists they wear bracelets of copper, iron, or whalebone, and on their neck sundry rows of the beads they make of bone, and ears, twisted wires of the same metal, jet beads, and certain little globules from a gum, which resemble topazes.⁹²

The expedition again encountered native-Americans at the most northerly point reached, 60 degrees 13 minutes.

By the end of July an old nemesis--scurvy--had afflicted yet another expedition and so it too turned toward the south, despite Bodega's protestations. The vessels drifted apart before meeting again at Trinidad Bay, California, and continued from there on to San Francisco for a six week recuperative stop. The layover ended abruptly when a courier brought news of war between Spain and Britain and of Viceroy Bucareli's death.

Spanish officials strove to establish a tenable presence on the northwest coast in the 1770's. As he received orders and warnings from his superiors Viceroy Bucareli organized and directed New Spain's efforts. Juan

⁹² Bodega, 37.

Perez in 1774 reconnoitered the northern shores, but never landed or took possession. The following year Bodega sailed to the Alaskan panhandle and took possession at several locations, while Mezeta, the expedition leader, at lower latitudes took possession and became the first non-Indian to espy the Columbia River. Under Arteaga and Bodega's leadership, the last Bucareli directed expedition in 1779 explored the coast of Alaska in some detail, and took possession in the name of the Crown at several locations.

Spain obviously wanted a territorial claim to the northwest coast that would be respected by its rivals. Given the expeditions' instructions, in Spain's estimation possession-taking clearly granted the legitimacy sought. Not surprisingly then, history dwells on the success of possession-taking as the unit by which to measure the success of the three expeditions.

CHAPTER IV

MEASURING SUCCESS

The significance and accomplishments of the voyages of Perez, Hezeta and Bodega, and Arteaga and Bodega have stimulated discussion among scholars. This takes into account more than successfully charting an island or a piece of coastline (not that such actions are considered unimportant *per se*). For example, Viceroy Bucareli charged these voyagers with specific instructions. How successfully did the mariners complete their appointed tasks? Did the relative success of a given expedition much matter; and, to the extent that it did (or did not), what are the terms used to define it?

History judges these men within two general contexts, two sets of terms. The most fundamental yet easily overlooked criterion for the historian is the cultural *weltanschauung* of which he or she is a part, and success is accordingly defined in these terms. This is of course necessary in order for a work to be relevant to readers who, after all, also comprise a part of the same general worldview. But it is not enough. The principle of 'scholarly detachment' should always apply to research and analysis. One should attempt to distance oneself from the subject of study and then come to some 'objective'

conclusion about it. Obviously, all but the most vain understand the inherent contradiction: the simple selection of a topic is itself a prejudiced decision. As William H. McNeil noted in his 1986 presidential address to the American Historical Association:

...the arrangement of facts to make history involv[es] subjective judgements and intellectual choices that ha[ve] little or nothing to do with source criticism, scientific or otherwise.¹

This is not to suggest that history is neither worth writing nor reading, but, rather, that one must approach it with a critical eye, ever on the lookout for lapses in logic, bias, and so on.

This notion presages the second context in which historians have evaluated Perez, Hezeta, Bodega, and Arteaga; that is, the historian's attempt to understand an event as it had been understood by those living when it occurred. It is not the intention of this paper to digress into a lecture on the merits of historiographical study, but only to set the particular terms of this chapter of enquiry.

All the authoritative accounts of the Bucareli-directed voyages fall into the category of attempted 'scholarly detachment.' One might argue this is so quite by definition; after all, clearly none of the authors knowingly expressed a biased opinion thought to be anything other than the truth, i.e., a factual representation of reality.

¹ William H. McNeil, 'Mythistory, or Truth, Myth, History, and Historians.' *American Historical Review* 91 (1986): 1.

Appropriately, the respective judgements granted Perez, Hezeta, Bodega, and Arteaga in history vary.

WHITHER JUAN PEREZ

Ensign Perez's place in history has remained largely static and not especially flattering to the Mallorcan mariner. Generally portrayed as an unforceful character lacking in fundamental courage, he has been roundly condemned. The particular charges against him are essentially two, the more serious of which stems from his failure to land anywhere on the coast and take possession for the Spanish Crown as ordered by Viceroy Bucareli. Additionally damning, Perez decided to turn back toward San Blas rather than pressing ahead to 60 degrees North latitude, again as instructed.

To understand the significance of the ensign's failure to take possession one must appreciate the enormous importance Spain attached to the ritual. Without the declaration of formal ownership derived from the traditional formulary, Spain of necessity had to concede that these lands were open to all comers. Thus, to effectively circumvent foreign encroachments on the coast, Bucareli instructed Perez and his successors to take possession, that is, to declare ownership.

Yet at the same time, official Spanish preoccupation with the ritual stood in a dialectical relationship to legal precedent. The 1670 Treaty of Madrid, penned by Spain and

Britain, recognized ownership of colonial possessions in the New World derived by *uti possidetis*, that is, by effective occupation.² Article Seven of the treaty read:

The Most Serene King of Great Britain (Charles II) and his heirs and successors shall enjoy, have and possess in perpetuity, with full right of sovereignty, ownership and possession, all the lands, provinces, islands, colonies and dominions situated in the West Indies or in any part of America, which said King of Great Britain and his subjects have and possess at present.³

The treaty clearly acknowledged what Britain and other non-Catholic European nations had long argued, that occupation determined ownership.⁴ The issue with regard to the northwest littoral, however, proved to be intractable, in spite of the Madrid agreement.

As noted, Spain, via Bucareli's instructions, continued to believe that successful application of the ritual would legally protect its 'possessions.' Paradoxically, Britain too acknowledged the inherent legality of the formulary, the Treaty of Madrid--and *uti possidetis*--notwithstanding. James Cook's 1776 orders, in part, read:

You are...to take possession, in the name of the King of Great Britain, of convenient situations in such countries as you may discover...by setting up proper marks and inscriptions, as first discoverers and possessors.⁵

² Cook, 47, 152.

³ Gordon Ireland, *Boundaries, Possessions, and Conflicts in Central and North America and the Caribbean* (Cambridge: Harvard University Press, 1941) 120.

⁴ George Woodcock, 'Captain Cook at Nootka: The Political Aftermath,' *History Today* 28 (1978): 98.

As should be readily apparent, Bucareli's instructions to Perez were at best legally ambiguous. While the formulary obviously held great importance for the Spaniards, it had been--at least technically--supplanted a hundred years earlier. Yet Britain also continued to respect the premise of the formulary, as demonstrated by Cook's orders.

Wagner dates the practice of ritualized Iberian possession-taking to late fifteenth century Portuguese voyages to the west coast of Africa.⁵ In following the course of the formulary's evolution, he finds it had become common practise for the Spanish by 1500. What might consummate the act in the sixteenth century included cutting trees, gathering water, piling stones in a distinctive mound-shape, and, especially, erecting crosses beneath which both bottles with documentation inside would be buried and mass would be said.

Upon discovering the Pacific Ocean's eastern shore in 1513 Balboa heaped stones into the shape of an altar, inscribed the Crown's name upon it, and cut trees such that they might be easily visible, to demonstrate Spanish ownership. Balboa is often misrepresented as having taken possession of the whole coast for Spain. This is clearly erroneous, otherwise Spain need never have concerned itself

⁵ Cited in Woodcock, 97. See also Manuel Servin, "Religious Aspects of Symbolic Acts of Sovereignty." *The Americas* 13 (1957): 263-64.

⁶ Unless otherwise noted the bulk of the following information has been taken from Henry R. Wagner, "The Creation of Rights of Sovereignty through Symbolic Acts." *Pacific Historical Review* 7 (1938): 297-327.

with Bucareli's possession-taking instructions given to Perez and others. Here or elsewhere, native-Americans witnessing the act would have had a *requerimiento*⁷ of sorts read to them with the intended effect to establish a basis for the Spanish claim. As should be apparent, these rituals symbolized more permanent actions that might be taken, such as establishing a settlement. Notably, officers took actions to attempt to ensure the crosses remained unmolested by the native-Americans, often to little effect.⁸

By the 1770's Spanish colonial officials had developed an elaborate formula for possession-taking, and fully one-third of Bucareli's instructions to Perez focused specifically on this symbolic action. The order read in part:

In a loud voice he [Perez] said that in the name of His Majesty the King, Don Carlos III, Our Sovereign (whom may God Our Lord keep for many years...) he, as captain of the frigate and by

⁷ The *requerimiento* was the declaration Spanish officers were required to read to the Indians before engaging them in battle. It consisted largely of offering not to make war provided the native Americans agreed to embrace the Catholic faith as the One True Religion. In practise, however, the Spaniards often read the *requerimiento* out of earshot, in the dark of night, or after a battle had been waged. Additionally, even if read in the prescribed manner the native-Americans could scarcely have begun to understand Spanish or Latin. See Haring, 6. See also Lewis Hanke. *Aristotle and the American Indians* (Chicago: Henry Regnery Company, 1959) 16-18.

⁸ The Iberians had no monopoly on ritualized possession-taking. Martin Frobisher followed a similar formula in Canada's north, as did Jaques Cartier in Quebec, and Sir Francis Drake on the northwest coast. These sailors also erected crosses (Drake left a plaque) and read a declaration in the name of their respective potentates. Wagner, "The Creation of Rights," 306-08.

virtue of the order and instructions which in the royal name were given to him by the aforesaid Most Excellent Viceroy of New Spain [Bucareli], was taking and took possession, was seizing and seized possession of this land...which he has discovered forever and ever in the said name of the Royal Crown...as its own property...by reason of the Donation and Bull of the Very Holy Father Alexander VI...given at Rome on May 4 of the year 1493.*

Bucareli also instructed Perez to erect a cross transported from San Blas, and to bury beneath it a bottle which housed papers testifying to the veracity of the claim. Finally, the orders directed the ship's chaplains to say mass, and lead the sailors in hymn.¹⁰

Despite the fact that in the late eighteenth century--as in the late twentieth--*might* often determined *right* in international disputes, Spain undeniably felt it stood on solid ground with regard to possession gained by such means.¹¹ As earlier noted, primarily the fear of Russian encroachments engendered the Perez expedition. Thus, without immediate plans for settlement, the success of an expedition--indeed, the success of Spain's general plan to monopolize more than 2,000 miles of shoreline and the

* Servin, 244-45.

¹⁰ It should be noted that no such possession-taking occurred in California. It was not necessary, given the establishment of the missions. Wagner, "The Creation of Rights," 311.

¹¹ Allusion is made specifically to the Nootka Sound controversy of the mid-1790's between Spain and Britain from which Spain came away empty handed not so much because Britain disputed the Spanish claim on legal grounds--although it did, ostensibly--as that Spain dared not risk war with its more powerful rival. See Cook.

unknown hinterland it sheltered--required strict adherence to Bucareli's carefully scripted instructions. Yet Perez failed to fulfill this most important of his orders. Why?

The one attempt Perez made to land and claim possession foundered off the upper west shore of Vancouver Island. By all accounts the sudden squall that nearly swamped the *Santiago* precluded taking possession at Nootka Sound, despite the attempted launch. Similarly, Perez's action in cutting loose the anchor line and heading out to sea is considered prudent. The question raised by most scholars is not with this event as such but, instead, why no other attempt to land occurred. The generally accepted conclusion can best be seen in light of Perez's decision to turn south rather than to continue to 60 degrees North latitude.

As noted, the ensign argued that dwindling water supplies and his crew's sickness from scurvy forced him to turn southward. Many scholars find these excuses inadequate and cowardly. For others, however, Perez's stature remains largely untarnished by the decision. Three works based on the examination of primary evidence show an inclination to favor Perez. Loosely, it is fair to conclude that earlier texts, such as Bancroft's (1880's), favorably evaluate Perez, while the later works, such as Cook's (1973), almost without exception have condemned him.

Bancroft extols ensign Perez for the simple reason that the expedition, despite its technical failure on several counts, broke new ground in history. Perez, he notes:

...though he had not reached latitude 60 degrees, as instructed, nor discovered any good ports, nor landed anywhere to take possession for Spain, nor found either foreign establishment or proof of their non-existence, he had still gained the honor of having discovered practically the whole Northwest Coast. He had surveyed a large portion of the two great islands that make up the coast of British Columbia, giving the first description of the natives; he had seen and described, though vaguely and from a distance, nearly all of the Washington coast, and a large part of Oregon. He had given to his nation whatever of credit and territorial claims may be founded on the mere act of first discovery.¹²

In short, being first, quite by definition meant going where none (except Indians) had gone before, thus history must recognize--and congratulate--the accomplishment.

The father of American borderlands history Herbert Eugene Bolton, whose assessment of Perez concurs with Bancroft's, on this count opines:

To the simple sailors with Perez the terrors of the uncharted North Pacific were no less real than those which cowed the crews of Columbus when he ventured across the mysterious Sea of the West. To the officers assembled these seemed reasons enough for veering to the shore, even though they were nine wide degrees short of the goal marked on the map by the hard-driving Bucareli.¹³

Clearly, both of these historians draw their primary measure of Perez from the fact that he was the first to go where none had gone before. Other evidence has been

¹² Bancroft, *Northwest Coast*, 156-57.

¹³ Herbert Eugene Bolton, *Fray Juan Crespi: Missionary Explorer on the Pacific Coast, 1769-1774*. 1927. (New York: AMS Press, 1971) 1. Named chair of the history department at the University of California, Berkeley, in 1919, the following year Bolton was appointed director of the Bancroft Library. See John Francis Bannon, *Herbert Eugene Bolton, The Historian and the Man, 1870-1953* (Tucson: University of Arizona Press, 1978) xvi.

marshalled to defend this approach. Bolton, for example, cites bad weather as the real culprit in Perez's inability to land.¹⁴ But he does not stop there; he would have Perez as a North Coast Odysseus stumped only by Fate in the pursuit of his goal.¹⁵ Bancroft, however, despite praising the ensign, also questions "Whether Perez made the best use of his opportunities..."¹⁶ But the illustrious bookseller is not striving to have it both ways, concluding, "Perez, a bold and experienced pilot, was a better judge than I."¹⁷

Chapman is also quick to laud Perez, but this ranking is derived tangentially. Chapman's work focuses on the history of California. To that end, Perez made genuine contributions: he led, for example, many supply runs from San Blas to the California presidios. From this valuable service Chapman's approach takes shape. He writes that Perez "was by far the most notable figure in the life of the province."¹⁸; and, that "none had worked more faithfully and unassumingly for the good of the new establishments."¹⁹

¹⁴ Bolton lvi.

¹⁵ Bolton, lvii.

¹⁶ Bancroft, *Northwest Coast*, 157.

¹⁷ Bancroft, *Northwest Coast*, 157.

¹⁸ Chapman, *Spanish Period*, 276. In 1915 Chapman earned his Ph.D at the University of California, Berkeley, under the tutelage of Herbert Eugene Bolton. He subsequently taught history there until his death in 1941. See Bannon, 102, 217-18.

¹⁹ Chapman, *Spanish Period*, 278.

Additionally, he accepts the bad weather argument endorsed by Bancroft and Bolton.²⁰

Where Chapman differs from the other two Perez sympathizers is that his validation of the Mallorcan's worth derives from the psychological phenomenon of generalization. That is, Chapman appears predisposed to favorably evaluate Perez in all endeavors for his positive contributions to early California history. In a very real sense Chapman's estimation of Perez is a logical non-sequitur because the conclusion does not follow from the evidence. In fact, Chapman presents no evidence on this count, preferring instead to measure Perez by a criterion that does not apply: how successfully the mariner performed his duties as a captain of the California supply vessels is irrelevant vis-a-vis how well he performed as head of the 1774 expedition to the Northwest coast.

As one of Perez's many detractors, Wagner was the earliest and most vociferous:

...[it was] a perfectly futile expedition. The fact is that Perez was entirely too timid for work in these northern waters. No good reason existed for not going up to 60 degrees as ordered, and for not landing and taking possession, which was the real object in sending him.²¹

The expedition, in other words, failed because ensign Perez proved altogether incapable of fulfilling the prime

²⁰ See Bancroft, *Northwest Coast*, 154; and, Bolton, lv-lvi.

²¹ Wagner, "Sierra's Account," 204. As Wagner's writing was voluminous, such criticism can be found in many places. See also Wagner, *Cartography*, 172-74.

directive, and his defense for not following orders is untenable.

Likewise, Michael Thurman blasts Perez for all the reasons Wagner advances, but his invective includes criticism for defying orders not to stop anywhere before Monterey (the month-long layover in San Diego *did* violate Bucareli's instructions), and suggests that the water shortage either was pre-meditated (at worst) or simply a sign of incompetence (at best).²²

Like Wagner and Thurman, Warren Cook chides the ensign for making but one attempt to land; and like Thurman he says that Perez needlessly wasted time in San Diego. But Cook goes even further, all but labeling the Mallorcan a coward. "Perez seems to have lacked in full measure the intrepid qualities requisite for meeting the challenges of his mission," the historian charges.²³ The invective continues, but for our purposes this statement is especially important for another reason, because it hints at the very different approach taken by the Perez-detractors vis-a-vis the Perez-sympathizers.

Cook, Thurman, Wagner, and others who, based on the examination of primary documents, see in Perez failure rather than success, do so in large measure because of the achievements gained by subsequent expeditions.²⁴ Cook's

²² Thurman, 131, 138-40.

²³ Cook, 62.

comment is a veiled comparison of Perez to Hezeta, Arteaga, and especially to Bodega, although names are not used as such. The Bancroft-Bolton approach can be tacitly disregarded as simplistic and narrow. Perez's first-discovery was meaningless legally, for all accounts here discussed recognize and accept the necessity of formal possession-taking. And as every historical account stresses the singular importance of possession-taking, anything less in fact signaled failure. Later expeditionary successes buttress this conclusion. That is, the bad weather argument appears ludicrous, retrospectively, when later voyagers met and prevailed over similar conditions without the benefit of greater--if not lesser, as was the case with Bodega and Mourelle--resources.

Analyses of the Perez expedition based on primary-sourced exist in short supply. More plentiful secondary analyses tend generally to criticize the ensign.²⁵ In doing so they typically cite Wagner, Thurman, and Cook, as well as utilizing the respective expedition journals. Of course,

²⁴ See also Donald C. Cutter, "'Spain and the Oregon Coast,'" *Western Shore*, ed. Thomas Vaughan (Portland: Oregon Historical Society, 1976) 28-46; Barry M. Gough, *Distant Dominion, Britain and the Northwest Coast of North America, 1579-1809* (Vancouver: University of British Columbia Press, 1980) 93-94; Derek Pethick, *First Approaches to the Northwest Coast* (Vancouver: J.J. Douglas Ltd., 1976) 43-44; and, Richman, 118.

²⁵ This includes four Masters theses: Mildred DeLongchamp (1946), Tomas Bartroli (1960), Oakah L. Jones (1960), and Herbert K. Beals (1983--see the bibliography of this paper for full citations). For a somewhat pedestrian presentation see John Kendrick, *The Men with Wooden Feet* (Toronto: NC Press Limited, 1986) 9-26.

many accounts simply relay the ''facts'' without evaluating the relative success of the voyage. This is most typical of the peripheral accounts such as those of Bernard Bobb, John Caughey, and Robin Fisher.²⁶

Before moving into a discussion of the Hezeta expedition it should be noted that at least one other defense of Perez's actions has been raised. In a very short study of Perez's final days, James G. Caster suggests that an undetermined illness afflicted the mariner and might well have caused him to act in a ''capricious'' way, thus lending to a frame of mind that might disregard orders.²⁷

Finally, it is also instructive to note that several authors cite Perez's contemporaries as being rather critical of him. Bancroft, for example, notes Mourelle's 1791 allegation that Perez's performance bordered on the inexcusable. On a coastline that stymied the ensign subsequent voyagers visited many hospitable natural harbors, Mourelle complained.²⁸ More suggestive, yet equally telling, Bucareli's fulsome praise of the voyage, Barry Gough, among others, interprets as evincing the viceroy's ''clear disappointment.'' ²⁹

²⁶ See citations for Robin Fisher, Caughey, and Bobb in the bibliography of this paper.

²⁷ James G. Caster, ''The Last Days of Juan Perez, The Mallorcan Mariner,'' *Journal of the West* 2 (1963): 15-21.

²⁸ Bancroft, *Northwest Coast*, 157.

²⁹ Gough, *Distant Dominion*, 94.

In conclusion, Perez has been on balance, if not exactly vilified, at least viewed with mild contempt. And, while the works here utilized are not exhaustive they represent the general corpus of work in English on the subject. To fully understand the context of the criticism, because much of the polemic stems from comparison with his colleagues from the Naval Station at San Blas, it is necessary to examine next the historical literature's treatment of the Hezeta and of the Arteaga expeditions, beginning with the former.

HEZETA AND BODEGA, 1775

Scholars unanimously extol the accomplishments of the Hezeta expedition. On virtually no count is the endeavor deemed anything less than a complete success for Spanish interests. The credit, however, belongs not to expedition leader Bruno de Hezeta but to Juan Francisco de la Bodega y Quadra and Antonio Mourelle, Bodega's second-in-command. Additionally, as previously noted, the success of this expedition casts aspersions about the much criticized Ensign Juan Perez.

Scholars overlook Hezeta for one very simple reason: the more significant achievements of the expedition occurred after his ship and the vessel commanded by Bodega parted, his turning southward and Bodega's continuing toward Alaska. Bodega, with the strong support of Mourelle, achieved the more substantive accomplishments of the expedition. Hezeta

is historically important as the expedition leader, and for earning some modest successes after the ships parted. Of course, often unstated in the literature is the inevitable comparison between the two vessels' captains.

Professor Donald C. Cutter raises two commonly made points with regard to the relative merits of the two ships' officers. First, he writes:

The intrepidity of these men [Bodega and Mourelle] is clearly demonstrated by the fact that the epic exploration was carried out with a somewhat reduced and undertrained crew.²⁰

Not only did the crew of the *Sonora* suffer the common depredations of the sea--especially scurvy--but the men endured them in amounts nothing short of considerably heroic proportions. When the vessel at length reached Monterey the crew was so ill that even Bodega and Mourelle had to be carried ashore!

In light of the ability and willingness on the part of Bodega to carry on despite sickness, Hezeta's decision to turn back pales. Writing for the majority, Cutter notes that Hezeta "was not so daring as Mourelle and Bodega, but his acts of possession were the basis for the Spanish claim to the area as far north as the state of Washington."²¹ In other words, where Perez failed completely to secure lands for the Crown, Hezeta achieved modest success. Bodega, on

²⁰ Donald C. Cutter, "California, Training Ground for Spanish Naval Heroes," *California Historical Society Quarterly* 40 (1961): 110.

²¹ Cutter, "Training Ground," 114.

the other hand, accomplished as much, quite literally, as human endurance would bear.

Scholars view Bodega's passion for adventure as nothing short of rapacious. On this count, amateur historian Derek Pethick presents the majority view using the courageous mariner's own words:

...the command of it has been delivered to me, and I must act according to the code of honor corresponding to my birth...if fortune were so adverse that it gave me no assistance, then it is a glory for posterity when each man dies at his post for the King.²²

The best evidence for Bodega's courage and, conversely, the squeamishness of the officers in the pilot ship (remember, Perez was Hezeta's second), can be found in the parting of the two vessels the night of July 31. As alluded to in Chapter III, essentially two opinions exist for why the ships parted: it was planned; or, it was accidental. Scholars who believe that Bodega and Mourelle acted in a premeditated fashion, such as Cook and Thurman, are also more likely to vilify Perez, and praise the former two mariners. Those who label the parting accidental, or are ambiguous about it, or those who mention nothing more than that the vessels parted and supply no especial reason for it, typically proffer a less harsh judgement of Perez (if judgmental at all). These historians, such as Bolton and Bancroft, also are more restrained in their praise of Bodega and Mourelle. Other works, such as Gough's, tend to be

²² Cited in Pethick, *First Approaches*, 44. See also Bodega, 3-4.

inconclusive: he lashes out at Perez, as earlier noted, but says virtually nothing about the 1775 and 1779 expeditions. The sum of the evidence points clearly to a negative evaluation of Perez.

Professor Chapman's treatment of the voyagers is a good case study of a disturbing pratfall that can trip the historian. First, he uses no relevant evidence to conclude that Perez was quite a success in his voyage north in 1774, and he all but completely ignores the eclipsing of the ensign's meager accomplishments by Hezeta and Bodega as a measure of him. Further, he ignores the influence of Perez in convincing Hezeta to turn southward (see Chapter III). Last, and quite despite his immodest claim to be on very familiar terms with archival materials, Chapman ignores the very obvious primary evidence that others (see Thurman, Cook, and even Bancroft citing the opinions of Bucareli and Mourelle) demonstrate paints a rather unflattering portrait of the ensign. Ironically, standing in juxtaposition to the Perez detractors, Chapman's apparent lapses highlight the basic conclusions others have come to with regard to Perez, Hezeta and Bodega.

ARTEAGA AND BODEGA, 1779

If Hezeta is often ignored in the literature, his notice is yet many times more evident than that of Arteaga, who led the last expedition to the northwest coast during Bucareli's tenure. While cartographically important, this

expedition, virtually all scholars agree, merits considerably less stature than the earlier two. Perez is given some measure of praise for being first in the region, breaking new ground, and, Hezeta-Bodega took the immeasurably important possession at various places along the coast. However, with regard to the primary impetus behind the voyages, the Arteaga expedition had little ground to break.

Bancroft notes nothing more than its feat of mapping the coastline; Thurman's assessment of the expedition is similar; and, likewise, Chapman mentions only that the expedition achieved a "careful exploration" of the Alaskan coast. The only remotely comprehensive treatment the expedition receives is from Cook, who credits it with the mapping, and for having the unintended effect of inducing the Crown "to rest on its laurels," secure in the erroneous belief that the coast held little interest for other European nations. For instilling a false sense of security in the Spanish court, Cook cites the expedition's failure to discover evidence either of Captain James Cook's visit or of a Russian presence in the northern waters.²²

ONE, TWO, THREE

Without question the expedition of 1775 is seen as the most successful of the Bucareli years. To that end, its officers are accorded commensurate amounts of praise. Hezeta

²² Cook, 97-98.

gets credit for, one, being the expedition leader and, two, for possession-taking on the Oregon and Washington coasts. Bodega and Mourelle reap the greatest praise because their contributions speak of great intrepidity--certainly in the mold of the Conquistadores--and their possession-taking further north was of considerable geopolitical importance in Spain's estimation.

For some scholars Juan Perez deserves real credit for being the first to brave the northerly waters, to go where none had gone before. Yet for most historians this accomplishment merits little cause for distinction. Perez failed because he was timorous, they conclude, and not at all--much to his disgrace--of the metal from which Bodega and Mourelle were hewn.

Scholars consider Ignacio Arteaga to be of no especial importance, despite his cartographical and possession-taking achievements. He receives scant historical treatment largely because his accomplishments neither broke substantive new ground, nor represented any particular strategic gain.

In summation, then, scholars unequivocally rank the intrepid Bodega and Mourelle well above their colleagues. The cautious yet persevering Hezeta represents an honored second position. Arteaga occupies what might be best described as a neutral, if not ambivalent, position--not unsuccessful, just ignored--near Hezeta. Perez sits quite alone and scorned in the distant last position.

CHAPTER V

CONCLUSIONS

The expeditions sent north from San Blas during the tenure of Viceroy Bucareli have in part been overlooked as a discreet subject of inquiry because the story they tell has no sense of dramatic closure. That is, as is frequently the case with general histories, and as is certainly the case with the literature surrounding this paper's subject, written history appears to seek out an unambiguous ending to a tale. While it may be that if one looks at the story of the three voyages of discovery--1774, 1775, and 1779--one can identify a beginning, a middle, and an end, along with several heroes and at least one chump, the story history prefers is the one that closes with the Spanish face-saving withdrawal from Nootka Sound in 1795. In that story, the voyages discussed earlier in this paper provide the opening act.

Although almost 10 years of Spanish inactivity on the Northwest coast followed the Arteaga expedition, a renewed interest kindled in the late 1780's. The impetuses, again, generally resembled those of the sixteenth century, though fear of the British had grown exponentially. The result, most methodically presented by Professor Warren Cook, led, first, to the establishment of a Spanish settlement at

Nootka Sound,¹ and, second, to a confrontation in the 1790's between Spain and Britain, when the latter challenged the Spanish claim.² Spain, traditionally allied with France against Britain, could count on no support from its neighbor torn apart by revolution. Unwilling to risk direct conflict with a more powerful adversary, Spain backed away from its claim to absolute sovereignty of the Pacific Northwest based on the Papal Bull of 1493, the right of first discovery (Juan Perez), and the possession-taking (Hezeta and Bodega, et al).

The Nootka Sound controversy thus climaxed the story of Spain's interest in the Northwest. Conveniently, it follows the traditional five-stage, Aristotilean course of narrative development: the ''situation'' is nothing more than the geopolitical context, a late eighteenth century Hobbesian world of competing interests; the ''complication'' is the mutually exclusive nature of the competing claims; the ''crisis'' arrives with the simple passage of time, i.e., at Nootka in the 1790's; the ''climax'' occurs with negotiations to avoid war; and, the ''denouement'' completes the tale as Spain withdraws. Whether or not historians have traditionally sought out such sequences to identify as discreet historical

¹ In particular, see Bartroli, Cook, Jones, Manning, and Derek Pethick, *The Nootka Connection, Europe and the Northwest Passage, 1790-1795* (Vancouver: Douglas & McIntyre, 1980).

² For a novel approach to the hammering out of the specifics of the settlement see Janet Fireman's article, ''The Seduction of George Vancouver: A Nootka Affair,'' *Pacific Historical Review* 56 (1987): 427-43.

topics, or whether they randomly impose such schematas atop events in itself represents a discreet subject; but for our purposes it is clear from a representative sampling of the literature on the Spanish presence in the Pacific Northwest that such a linear trajectory lending itself to the Aristotilean development exists with regard to Spain in the northwest.

The causative agents engendering the expeditions during Bucareli's tenure remained consistent, if not constant. Equally important, yet touched on in none of the literature, the same can be said with regard to the late sixteenth-early seventeenth century voyages compared to their late eighteenth century counterparts. The lust for riches, for example, changed somewhat over two centuries in focus and intensity (dreams of a northern *Cibola* existed only unofficially). As reflected by the heroics of Bodega and Mourelle the will to adventure also continued to inspire mariners; and the vilification of Perez emphasizes the point. Ultimately however, the quintessential, vainglorious Spanish concern entailed protection of territory that it held to be its own; and Spain's success has necessarily been measured by historians in these terms. That historians have for the most part judged Perez, Hezeta, Bodega, and Arteaga by the standards of their own era, then, denotes an essential fairness to the grades. In this respect, any similarity, whether warranted or not, between the grades and the "'Great Men Make History'" school should be seen as

incidental, if not irrelevant. Yet there are problems with the approach northwest scholars have followed.

To focus exclusively on the Spanish colonial *weltanschauung* as the appropriate lens through which to view--and grade--the mariners obfuscates the important didactic role history can play, by isolating Spain without reference to the larger international context. Moreover, it cloaks the past in unmerited romanticism, while essentially denying the *realpolitik* of the period. Spain's desire to add one more jewel--the Pacific Northwest--to her tarnished imperial crown ironically reflects the fundamental weakness of its political system, and how that system had become thoroughly anachronistic for a would-be great power by the late eighteenth century.

Warren Cook concludes *The Flood Tide of Empire* by arguing that Spain's attempt and subsequent failure to secure the northwest signaled the apogee of its imperial growth and expansion.² This argument, while essentially correct, geographically, is superficial, for it ignores all but the most obvious reason--Britain outgunned Spain in Europe--that doomed Spain's northwest coast venture to failure. Further, like other historians, Cook, by neglecting fully to acknowledge the link between the impetuses behind the Bucareli-directed voyages and those of the late sixteenth-early seventeenth century expeditions, fails to

² See Cook's chapter, "The Atrophy of Empire," 524-37.

distinguish the crucial point that Spain's imperial designs had been, since the inept reigns of the first Hapsburg monarchs, stymied for two fundamental socio-economic reasons, which ultimately portended Spain's imperial apogee and atrophy. First, Spain's autocratic-mercantile nature precluded effective exploitation of the Pacific Northwest. And, second, Spain's non-Catholic European rivals--Britain, in particular--proved to be far more able to exploit economic opportunities, in short, out-competing the Iberian nation.

Spain had made the mistake of assuming its New World economic successes occurred as the direct result of its method of conquest and exploitation. The accepted veracity of this erroneous notion grew in direct proportion to its longevity. The Bourbon Reforms, it should be recalled, aimed at improving a time-worn system, not fundamentally altering it. The basic structure of government did not change in Spain after the Bourbon dynasty replaced the Hapsburg line, or in New Spain until the revolution for independence in the early nineteenth century. Spain's colonial profits were the ironic result of an approach that enjoyed success in New Spain, for the most part, out of sheer coincidence.

Throughout the colonial period Spain basically sought bullion from which it derived spiritual and economic sustenance, and found it aplenty in New Spain. The negligible effort required from the Spaniards, apart from establishing a way to exploit native labor, to extract the

riches reinforced a distinctly non-capitalist cultural imperative. Moreover, the positive correlation between the method employed and the results achieved the Spanish confused for cause and effect. New World gold and silver thus fueled the empire economically and spiritually, and engendered the political will necessary for expansion.

That the expeditions discovered no conquerable or easily extractable supply of bullion on the northwest coast may or may not have influenced Spanish officials as to the region's attractiveness, but the fundamental issue that the lust for bullion illustrates is that Spaniards had not culturally developed, or adopted, another means by which to generate wealth. The Western world had changed dramatically since Columbus invaded the Americas, but Spain continued to live in the past. The Russians for decades had exploited the sea otter trade in the north, but the Spanish, because of restricted mercantile policies--indeed, one might accurately say, mercantile mentality--neither had encouraged exploitation of the trade nor had prepared its citizens to be able to identify and seize early capitalist opportunities.

Increasingly hapless, Spain's economic fortunes had been born of a mercantile system thoroughly ossified by the late eighteenth century. Britain, on the other hand, adapted to and encouraged the creation of the emerging new world economic order, capitalism. The Bucareli voyages--their *raison d'être*, and accomplishments--stood in relation to

foreign designs on the northwest coast as Spain's moribund mercantile system stood in relation to emerging capitalism and Great Britain: destined to achieve less than ostensibly sought.

Warren Cook also argues that had Spain been more vociferous in staking its claims to the northwest littoral, it might have held the region. Britain, he writes, found itself in no position to hold the territory, as Spanish firepower exceeded British in the northeast Pacific.⁴ But again, Cook overlooks a crucial aspect of the Bucareli voyages. The limited scope of the expeditions--a total of five vessels sailed--in part reflects the insufficiency of funds available for such ventures; but more importantly, the meager financing illustrated a general lack of interest in Spain for the northwest coast of North America. The crown had an enormous empire to govern, and funds were necessarily allocated on a priority basis. Why had Spain squandered two centuries of potential discovery and occupation before deciding to return to the northwest coast in 1774? The answer is, for all the reasons heretofore discussed. To suggest that Spain could have defended the territory disingenuously romanticizes and distorts the crown's intentions.

Viceroy Bucareli's role in the voyages, while his roughly nine years as secular regent of New Spain serve as traditional perimeters to border this study, proved to be of

⁴ Cook, 525.

little consequence. Of his considerable merit as an administrator there is no doubt. Of his role, other than organizationally, in the expeditions there also is little doubt: a follower, albeit a very good one, the viceroy generated few original ideas. Visitador Jose de Galvez deserves most of the individual credit for launching the expeditions, but such recognition requires a caveat or runs the risk committing a non-sequitur in the manner of Chapman with Perez in California. Certainly, Galvez was the key figure, but the genesis of his plans were only a manifest reflection of the zeitgeist of the Enlightenment, of which he was a part and product.

Moreover, crowning Bucareli, or Galvez, as "'King of the Expeditions'" would at best be an empty title. After all, Spain got nothing for their efforts: no bullion; no profit from the fur-trade; and, few native-American converts. Finally, as Barrington explained the reasons for translating and publishing Mourelle's diary:

I was principally induced to take this trouble, because I supposed, that the Spaniards, from their most peculiar jealousy with regard to their American dominions, would never permit that navigators of other countries (particularly the English) should know the excellent ports of the Western part of America.⁵

Deeply ironic, the Spanish salvaged not even the glory of first discovery, which until recently all too often went to James Cook.

⁵ Barrington, 484-85.

BIBLIOGRAPHICAL NOTE

Because the 1770's Spanish voyages of discovery and exploration have received no discreet, full-length airing, determining where the voyages sit with regard to accomplishment requires drawing evidence from a variety of sources. The same sources have also been used as supporting documentation for this work. There is no disingenuity in this: we are not interested in what happened so much as to understand why what happened is thought to be important or not important. First, there exists what for the purposes of this essay will be referred to as the "'regional'" history, where our subject is addressed with varying emphasis as part of larger projects.

Bancroft provides good examples of the regional study in his histories of *California* (1884), *Alaska* (1886), and of the *Northwest Coast* (1886-88), the latter being of the most interest. These comprehensive, seminal works necessarily examine figures such as Perez, Hezeta, Bodega, and Arteaga. Also in this group we can identify Charles Edward Chapman's oft cited and well documented histories of California (1913 and 1928). John Caughey's history of California, although differing sharply with Chapman on the causative agents behind the voyages, is an excellent, carefully prepared work (1940). Irving B. Richman's history of California represents

a third general-regional study of some interest (1965). Alan C. Hutchinson's study of the California frontier lends greater credence to Caughey's more complex presentation of the impetuses behind the voyages. Margaret A. Ormsby's textbook, *British Columbia: A History* (1959), does not for the most part rely on primary sources for its information, and in this sense is more typical of the northwest coast histories. This list is, of course, by no means exhaustive with regard to the body of historical literature of the several regions--it is not meant to be--rather, these works are important for this study because they all directly have offered opinions with regard to the voyages and their crews: Perez, Hezeta and Bodega, and Arteaga and Bodega have received greater or lesser amounts of scrutiny with varying conclusions reached.

A second body of material can be drawn from sources focused more directly to the "'northwest coast'"--and will be so referred to--but range in specificity, and in their interest for our subject. This group includes the re-issue of John Barrow's interesting examination of voyages to Arctic waters (1818). Henry Raup Wagner's exhaustive *Cartography of the Northwest Coast* (1937) provides a wealth of information, yet, as is typical of Wagner's work, is steeped in minutiae and provides little synthesis. The remaining works focus without exception on the Nootka Sound controversy of the mid-1790's. While W.R. Manning's 1904 report to the American Historical Association was published

in periodical form (the *American Historical Review*, 1905) its comprehensive scope warrants notice here. Warren Cook's formidable 1973 *Flood Tide of Empire* clearly stands as the definitive work in this field. The work of Thomas Vaughan (as editor and contributing author, 1976), J. Arthur Lower (1978), Derek Pethick (1976 and 1980), Barry M. Gough (1980), and John Kendrick (1986) provide standard and satisfactory treatments of the Bucareli-directed voyages. All rely more or less heavily on secondary sources. Four masters theses can also be included in this group: Mildred DeLonchamp (Adams State College, 1946), Tomas Bartroli (University of British Columbia, 1960), Oakah L. Jones (University of Oklahoma, 1960), and Herbert K. Beals (Portland State University, 1983). Additionally, selected periodical literature labors in similar, if less comprehensive fashion: see William H. Galvani (1920), Lillian Estelle Fisher (1929), James G. Caster (1963), Clinton R. Edwards (1964), Christon I. Archer (1978-79), Eric Beerman (1982), and Janet R. Fireman (1987). Again, as was the case with the regional studies, this list does not exhaust all sources but it is representative of the salient conclusions reached with regard to the voyages discussed in this study.

Finally, a last distinguishable group deals with the voyages in a "peripheral" way, as part of discreet inquiries tangentially related to our subject. These include works whose focuses lie elsewhere but find a discussion of

the voyages indispensable to their topics. They include the anguished prose of Herbert Ingram Priestley's otherwise commendable 1916 biography of Jose de Galvez. The seminal American borderlands historian Herbert Eugene Bolton's 1927 study of Fray Juan Crespi is also instructive. Alfred Barnaby Thomas only briefly notes the northwest explorers in his *Teodoro de Croix and the Northern Frontier of New Spain* (1941). Bernard E. Bobb's 1962 biography of Antonio Bucareli is a mature, well researched labor of love, and an invaluable source. The exemplary 1967 study of the Naval Station at San Blas by Michael E. Thurman examines the voyages and their captains in some detail. Finally, Robin Fisher touches on the expeditions in a 1977 study of the early years of British Columbia.

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