

São Jorge da Mina and Macao: a comparative reappraisal of European encounters

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Abstract: The early modern Portuguese empire presents a variety of case studies to explore the process of border making experienced in direct response to European activity and imperialism. Considering its scale and dispersion, the Portuguese empire shows both fluidity and rigidity of borders and the strategies of control and security taken in response to or within their establishments. The Portuguese factory of São Jorge da Mina, that was built in 1482, and Macao, one of the most important European harbours in Asia in the 1550s, offer valuable insights into early Portuguese/non-European relations. Both cases constitute a concession of a limited and well-defined land where the Portuguese could stay, with full control, resulting from agreement with the terms stipulated by the local authorities. Considering the asymmetries of historiography when treating the two cases, rather than a direct comparison, this article aims to bring some reflections on these experiences as paradigms of the limit of action of the early modern Portuguese empire.

Keywords: Portuguese empire, governance, port cities, early modern history, sovereignty.

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From inside-out and from outside-in

The experience of the Portuguese empire during the early modern period presents a variety of case studies to explore the theme of ‘securitisation’.¹ More precisely, this article will consider this topic in relation to the process of border making experienced in many regions of the world in direct response to European activity, and subsequent effort to evolve, sustain and protect their settlements on the part of the Europeans.² It will consider how flexible or rigid these borders were, and, consequently, which strategies of control and security were taken within these spaces: from both directions, inside-out, in the sense of the Portuguese community settled in a given space to control those who could have access to their settlement, and from outside-in, in the sense of the impediment of their circulation beyond their establishment. To discuss these matters, this article will focus on two of the most prominent Portuguese territories in the early modern period: the Portuguese factory of São Jorge da Mina, built in 1482, and Macao, one of the main European port cities in Asia during the 16th and 17th centuries.

These two cases offer valuable insights into early Portuguese/non-European relations, both regarding the experience of participants in concomitant encounters themselves and how they have been explored by historiography. After all, it is widely known how the Chinese were capable of controlling the Portuguese (and wider European) presence in their territory,³ but the experience in West Africa has received much less attention⁴—as if the limited Portuguese establishment was a consequence of a lack of interest or competition with other Europeans rather than a result of local resistance.

Taking distance from the literature that considered the Portuguese empire as a homogeneous enterprise that responded to the same motivations and challenges in the different parts of the world, the study of the specifics of two cases in which the Portuguese were in many ways dependent on the non-European locals might be helpful to enrich both colonial and postcolonial studies.

After all, what the two cases here presented illustrate is that more than the Portuguese dependence on permission from local rulers to move forward at this stage there was no possibility of doing so. Their business and sphere of action in both territories were clearly and rigidly delimited, not being flexible or reshaped during the Portuguese administration. Therefore, the purpose of such analysis, more than

¹ For a global view of the Portuguese expansion and economy, see [Godinho \(1963/1965\)](#). Securitisation was first presented by [Wæver \(1995\)](#), the theory was later developed in [Buzan et al. \(1998\)](#).

² See [Herzog \(2015\)](#).

³ See [Souza \(1986\)](#).

⁴ As criticised by Toby Green, historiography has been failing in addressing African history in the analysis of the cultural and economic networks in the early modern world ([Green 2011: 17](#)).

anything, is to confront a perception of predominance or control from the part of the Europeans over the extra-European territories under their interference during the early modern period. It is in this sense that the combined study of Mina and Macao shows us that much like the Europeans with whom they were in contact, 15th- and 16th-century Africans and Asians were working on a complex and regulated social and commercial system.

From considering asymmetries in historiography, this kind of analysis might help to give voice and bring new light to the historical understanding of the relationship between the different parts of the world. More than anything, it intends to show how both West African and Southern China populations held the protagonist role in what concerns their relationship with the Europeans, in this case, Portuguese imperial and commercial agents, having demonstrated a coordinated and strong political strategy to protect and secure their territory and interests.

Not intending to discuss the concept itself but rather its broader pertinence for the study of the two examples here selected, it is worth noting how ‘securitisation’ offers an interesting filter for the analysis of the definition of social risks and threats, and of how these categories shaped the protection and control over imperial territories. The theory has been criticised for being too state-centric and focused on the ‘speech act’,⁵ making it unsuitable for the analysis of more practical events.⁶ This criticism seems to be even more pertinent when considering the study of cross-cultural encounters in the early modern world between Europeans and non-European societies,⁷ as the notion of a strictly defined, territorial state was far from the reality in many of the territories involved. Instead, in this article, the concept of security will be used to consider the practices that surrounded the day-to-day activities of individuals who operated in border spaces and to interrogate the ways in which border making could simultaneously limit their movement and provide the necessary infrastructure for communication and exchange.

The effort in connecting, communicating, interacting, circulating, protecting and, in some sense, securitising, were common struggles for participants in early modern European empires. But not only, since, as can be identified in the two cases here selected, the extra-European populations also took more coercive and protective measures to defend their people and territory.

⁵ ‘... through which an intersubjective understanding is constructed within a political community to treat something as an existential threat to a valued referent object, and to enable a call for urgent and exceptional measures to deal with the threat’ (Buzan & Wæver 2003: 491).

⁶ See Balzacq (2005).

⁷ For a discussion of the application of the concept in early modern and modern history studies, see the journal *Historical Social Research* on ‘Security and Conspiracy in History, 16th to 21st Century’, especially the following articles: Zwielerlein & De Graaf (2013a); Zwielerlein & De Graaf (2013b); Zwielerlein (2013).

Security was, in all its facets, a means of dictating the relationship with local populations, conducting, conditioning and facilitating the establishment of cross-cultural exchanges—both sides needed to feel secure if they were to do business with the other. Although the challenge seems to be simple and consistent, in practice it was much more complex. In both cases explored here, the concession of a restricted and precise territory where the Portuguese could stay, but with limited power beyond their small enclosure, meant that they had to act in accordance with the terms and customs stipulated by the local groups, including receiving local merchants, organising embassies, enforcing standards and the payments of taxes. Taking these limitations into account, my intention here is to use conceptions of security as a lens to examine the constraints imposed on the Portuguese empire in two of its most emblematic historical settings. This exercise will start from the assumption that the measures of security and control that limited and conditioned these establishments were also what made them even possible, constituting a clear example of the process of border making in the early modern world.

In Polanyi's idea about the 'port of trade', competition was determined more by the administration of a given port than by the economic activity itself.⁸ For example, in the early modern period, the exchange of gifts and ceremonial meetings with local representatives, as seen in São Jorge da Mina and Macao, was a practical initiative to mitigate any conflicts—serving not only commercial but also security purposes. In an unfavourable and uncertain environment, the port of trade often represented a neutral venue where a unique form of trade and interaction could take place.⁹ Following this logic, both São Jorge da Mina and Macao were built to strictly serve commercial purposes, having remained like this without developing any further imperialistic goals.

The central argument is that, in what concerns the relationship between non-European authorities and an European power, the Portuguese achieved some level of 'security' and a reasonably stable establishment by interacting with local authorities, commercial agents and networks in place—not by force or imposition. Which is to say, far from a forceful presence, the Portuguese were dependent on being attractive enough to grant concessions by local authorities in both Mina and Macao.

The comparison between the Portuguese enterprise in São Jorge da Mina and Macao will therefore unveil several levels of security within the Portuguese empire (targeting both the continent and the arrival of other Europeans by sea), an approach which is crucial to understand the central role of individual actors as negotiators between imperial and local interests. If in Portuguese India and America a more structured and militarised presence is perceived from the first decades of their relationship

⁸ Polanyi (1963: 30). As defined by Luis Felipe de Alencastro, Polanyi's idea about the 'port of trade' is the most appropriate for understanding most of the Portuguese empire before the Restoration (1640), as it was formed by a network of enclaves and factories (1998: 195).

⁹ Polanyi (1963, 36).

with the local populations,¹⁰ in West Africa and Southeast Asia the reality was totally distinct—and even more peculiar in these two small and well-delimited peninsulas. Therefore, the analysis of this phenomenon under the light of the process of border making might help us to understand better the interactions that the new global dynamic facilitated, followed by the consequences and mechanisms to regulate and restrict these same interactions.

Mina

Portuguese activity in West Africa was recognised as one of the most attractive and promising in the empire in the first half of the 16th century. Even so, it has received a secondary attention within historiography of the early modern/modern period¹¹—at least when considering other territories in Africa such as São Tomé, Cabo Verde and Angola, and even more so in comparison to Asia and Brazil. The fact is that, by the end of the 16th and beginning of the 17th century, Mina was one of the most profitable but territorially limited establishments of the Portuguese empire. However, the minimal territorial expanse of the Portuguese presence at São Jorge da Mina should not be presumed to reflect a lack of interest or capacity for investing in the region, but also because of the restrictions and measures of control implemented by the local groups.

The factory of São Jorge da Mina (*Feitoria da Mina*) was the first European trading post built on the Gulf of Guinea and one of the most important centres of the gold and transatlantic slave trade in the 16th and 17th centuries. Showing its prominence in the period, an illustration of the building was highlighted in a 1563 map of West Africa made by the Portuguese cartographer Lázaro Luís ([Figure 1](#)). From this image, the building seems to dominate a significant part of the region known as the *Costa da Mina*, having a lion holding the Portuguese flag on the top of a hill in front of the castle—a clear symbol of the power from Portugal.

Even if considerably disproportionate, this map illustrates the importance of the territory for the Portuguese empire and their eagerness in keeping and promoting the factory during a period when European competition in the region was growing. The castle, represented in Luis's map as a massive building that covers a major part of the territory, was actually a fairly small fortification at the end of a narrow peninsula—it was naturally limited by the terrain's geography. São Jorge da Mina, therefore, despite its importance or illustrated grandeur, was a quite restricted establishment, one in

¹⁰ For the Portuguese conquests in India see [Bouchon \(2000\)](#). For the Portuguese colonial enterprise in Brazil see [Hemming \(1978\)](#) and [Bethell \(1991\)](#). For a recent publication on a broader view of the Portuguese empire's military sphere see [Carvalho et al. \(2021\)](#).

¹¹ [Elbl \(1992: 106\)](#).



Figure 1. Map of West Africa in a nautical chart of the cartographer Lázaro Luis (1563), held at the Academia das Ciências de Lisboa.

which the Portuguese were never able to go much further than the limits of their building.¹² Yet, as well as geography, this limitation was, more than anything, the fruit of local people's resistance in letting the Portuguese have free access to their lands.

As defined by Filipa Ribeiro da Silva, West Africa is commonly taken as part of the periphery of the empire, but it was only 'peripheral in the sense that Western African local economies did not depend on the trade with Europe or the Americas for their survival'.¹³ This is a critical point for understanding Portuguese activity in the Costa da Mina, as their trade was heavily dependent on local commercial networks and merchants, and their settlement on the local approval—yet maintaining these relationships was by no means plain sailing.

More than anything, it was the study of the complexities of this relationship that mined the 'civilising mission' discourse widespread in the 19th century and even more

¹² Vogt (1979: 86).

¹³ Ribeiro da Silva (2011: 5). About the position of West Africa in the creation of the Atlantic World, see Curtin (1975); Thornton (1992).

projected during the Salazar dictatorship in Portugal.¹⁴ At the time, Africans were considered by nature inferior to Europeans, being therefore colonised almost as the Portuguese wished. The regime mentality reinforced an image of the Africans' lack of civility and capacity to resist European power.

As Isabel Henriques pointed out throughout her remarkable work,¹⁵ the Portuguese historiography before the end of the Estado Novo regime was characterised by the refusal of giving any autonomy to the history of the colonised. As such, even when considering territories that were not colonised or a period before when proper colonisation took place, the Africans were never considered as complex societies or agents and holders of a history of their own. During this period, only few historians, among which the more dedicated was probably Vitorino Magalhães Godinho, tried to surpass the rhetoric of glorifying the great Portuguese conquests¹⁶—even if foreign historians such as Charles Boxer and David Birmingham already were contradicting this view.¹⁷

What the analysis of São Jorge da Mina shows is that local merchants followed commercial strategies based on technical skills, diplomacy, innovation and creativity as much as the Europeans even if there was some imbalance in what concerns technology. The indigenous were far from being passive or resilient, in the sense of only receiving and adapting to the foreigners' demands in their territory.

Recognising this situation, Duarte Pacheco Pereira,¹⁸ a Portuguese sea captain, soldier, explorer and cartographer, described the unfavourable Portuguese position during the foundation of the Factory of São Jorge da Mina:

*Since between the people of this land and our people there were many differences about the construction of this fortress because they did not want to consent the construction, for their sorrow it was built where with much service and diligence it was finished, what was then necessary to the establishment and defence of us all.*¹⁹

¹⁴ Caetano (1951).

¹⁵ See Henriques (2004; 2019; 2020).

¹⁶ 'The economic, social and cultural processes of the oceanic expansion were hidden. There was no interest in History as search for the truth, it was reduced to a rhetoric of commemoration and justification of imperial "grandeur"' (Godinho 1990: 13–14).

¹⁷ Boxer (1963) and Birmingham (1965).

¹⁸ Pereira was the captain of São Jorge da Mina from 1519 to 1522. The captain was the ruler of the city, being followed in the hierarchy by the *Feitor* (Factor).

¹⁹ 'E posto que entre os negros desta terra e ha nosa gente ouve muita deferensa sobre o fazer desta fortaleza por a nom quererem consentir enfim a seu pesar se fez honde com muito serviso e deligencia se acabou o que entom foi necessario pera recolhimento e defensa de nos todos e posto que entre os negros desta terra e ha nosa gente ouve muita deferensa sobre o fazer desta fortaleza por a nom quererem consentir engim a seu pesar se fez honde com muito serviso e deligencia se acabou o que entom foi necessario pera recolhimento e defensa de nos todos' (Brásio 1952: 4).

From this fragment we can identify some of the major obstacles and apprehensions the Portuguese faced in their attempt to establish their presence in the region. First, the construction of a fortress was not well received by the locals, who were in general resistant in letting the Portuguese to move forward with their plan.²⁰ Second, Pereira mentioned that the fortification was expected to serve not only as an accommodation or for trade but also for their defence. This meant their own physical protection but also of their goods (*fazendas*), and not only in relation to the locals but also in the imminent possibility of other Europeans to reach the territory.

During their first encounter with a local leader in 1482, the Portuguese faced hesitation and opposition to their proposed fortress.²¹ Recounting this meeting, the Portuguese chronicler Rui de Pina described that the Portuguese ‘begged them [the local people] to give them a place and permission, and also help to build an entrance to the river’.²² As this suggests, the power dynamic that developed around São Jorge da Mina was complex, and even as some local people complained about the Portuguese presence, the Portuguese depended on permission from local rulers to move forward. Rather than a militarised or forceful imposition—such as those taking place in Brazil and India, where were respectively founded a general-government and the State of India, a proper regional administration delegate by the Portuguese crown to each territory—in this part of West Africa the Portuguese had to convince local African people to concede a piece of land where they could place their trading factory, as this would not be successful without their authorisation. There was no complex administrative structure from the part of Portugal to give any support in the region nor an opening to expand their settlement any further into the hinterland.

Despite limited local support, Duarte Pacheco Pereira described how the establishment of the Portuguese settlement quickly altered local relationships, claiming that ‘these people were gentile and some of them were already made Christians, this

²⁰ As described by Alberto da Costa e Silva, the benefits of having an European trading post were diminishing when the territory was militarised with the construction of a fortress, in the time that the local chiefs had no control over the goods brought to Mina. Besides that, the circulation inside the walls was controlled, measures of security, including weapons, were placed, which, even if not targeting the locals, was a matter of apprehension (2002: 151).

²¹ Commonly called by the Portuguese *Caramansa*: ‘pera nelle receber per concerto ho Senhor do lugar, que se dezia Caramansa, a que os negros chamavam Rey’ (Brásio 1952: 10).

²² ‘E porquanto por aver razam de as mercadorias qe agora traziam, e ao diante viessem, estarem aly sempre continoas, limpas, e seguras, era necessarea hua casa, lhes rogava que dessem lugar, e licença, e ainda ajuda pera na boca do rio se fazer, porque della, e dos Christãos que nella estevessem sempre achariam, e receberiam emparo, proveito e favor’ Brásio (1952: 11–12).

I say for the inhabitants of the land in the same place where the castle is, because the merchants come from far away and do not have many conversations with us as those who are our neighbours'.²³ This was a decisive point in the creation and maintenance of the factory. The Portuguese were able to sustain a direct relationship with the neighbouring village outside the limits of São Jorge da Mina but had almost no contact with the hinterland. The trade with other regions was made through merchants coming from the interior to the fortress, and this dynamic remained the same during their whole time in the region. More importantly, the trading post was created and fed by the economic system already in place, working to be as attractive and suitable as possible for the locals—not the other way around.²⁴

That being said, concurrent to the establishment of the official Portuguese position at São Jorge da Mina, there were also the so-called *Lançados* (meaning those who throw themselves into the region) who functioned as free agents outside the Portuguese empire's orbit.²⁵ Although they were not that common in the Costa da Mina, the *lançados* were, no doubt, an important element of the Portuguese and later European presence in Africa. But in reference to the situation at the fortress, as an official trading post that belonged and responded to the Portuguese crown, the significance of the *lançados* is most notable in its central responsibility to control illegal trade in the region, and this depended on a more careful and reconciliatory dynamic with local groups. Knowing how to keep local interest and sustaining good relationships with individuals from further inland was not only determinant for the commercial success of the factory, but also for its very survival once European competitors became an imminent menace.

Returning to Rui de Pina's narrative of the initial Portuguese settlement at São Jorge da Mina, he recorded that, after the exchange of gifts, 'all the evil from the locals soon became good, and their narrow defence in double consent'. Considering where the castle was located, Pina described that when it was erected, soon the process of compensation and gift giving began, for when it 'was necessary to break

²³ 'Esta gente atee guora forom gentios e já alguns delles som feitos christãos isto diguo pellos moradores da terra do mesmo luguar honde esta ho castello por que os mercadores som de longe e nom teem tanta conversasom com nos outros como estes que som vesinhos' (Brásio 1952: 5).

²⁴ One of the most important goods in the Gold Coast during this period was salt, which was exchanged for products brought by the Akan traders. The circulation was made not only by foot but also using canoes, making the proximity to any river ideal—even though the Portuguese could never take control over these routes, fully depending on the Africans. From this understanding, Daaku indicated that the Portuguese worked following the same precepts of the African economic system, exploring the Akan merchants coming from the interior and adapting their trade to the local demands and interests (1972: 237).

²⁵ See Silva (1970a; 1970b).

down some houses of the locals, in which they, and their wives, for the great satisfactions and gifts that were given to them, lightly, and without scandal, consented'.²⁶ Thus, despite limitations on their actions in the region, this was one of their main strategies to gain local attention and consent. Giving gifts to the merchants, representatives, local authorities and their relatives became a common strategy during the Portuguese rule in Mina (being common in other regions as well)—as demonstrated by dozens of receipts preserved at the Torre do Tombo archive in Lisbon.²⁷ These gift-giving ceremonies could take place when representatives visited the castle itself,²⁸ or, whenever possible, when the Portuguese sent embassies to visit one of the local 'kings'.²⁹

These practices were essential for securing the Portuguese presence on the Costa da Mina. Having only a small settlement on the coast, surrounded by the sea from one side and the African village from the other, it was important not only to keep the 'good peace and friendship' between the Africans and the Portuguese, but also between the different local groups—those near or far. Efforts made towards pacifying relationships between neighbouring kings and cultivating a positive image were clear examples of how the Portuguese establishment was reliant on the locals to promote the trade, and how it was vulnerable to any winds of change. This was very important because, as shown in [Figure 2](#), the castle was positioned in the intersection between the kingdoms of Eguafó (including Comane or Acomane) and of Futo (also Fetu, Futu). But, through the merchants coming more from the interior, those in the factory were also exchanging with other groups, including the Wassá

²⁶ 'Polo que mandou que o presente nom tardasse, em que pola maior necessidade que avia de favor enadio mais alguas cousas, com que todo o mal dos negros se tornou logo em bem, e sua estreita defesa em dobrado consentimento. Polo qual atee que a Torre foy acima do sobrado, nom se assynou, nem fundou outra casa, nem assento algu. E como foy emcima, logo se começou o cerco do castello, pera que foy necessario derribar alguas casas de negros, em que lles, e sua smolheres per grandes satisfações, e dadivas que lhes deram, levemente, e sem escandalo consentiram' ([Brásio 1952](#): 13–14).

²⁷ These receipts are part of the collection of documents '*Núcleo Antigo*'. A few were published in the *Monumenta Missionária Africana* (1952–6). Some of these gifts were expected to help to open the ways to the merchants, being given to those kings who were on their route to the castle; others were given to those who were visiting the fortress—being merchants, kings, sons or other relatives of some of the 'kings'. Among the most common gifts were animals, cloth and *manilhas* (bracelets). For an analysis of the gifts offered by the Portuguese at Mina in the first half of the 16th century, see [Ballong-Wen-Mewuda \(1993\)](#).

²⁸ As shown, for example, in an order of Fernando Lopes Correia, Captain and Governor of the City of S. Jorge, from 1518, in which he said to be given 'two pesos of gold to buy a goat to give to two black merchants who opened the way to the Assas'. In Torre do Tombo, *Corpo Cronológico, Parte II*, mç. 77, n. 31.

²⁹ As shown in another order of Fernando Lopes Correa, from 1519, the captain asked to be bought 'a pope blanket for nine pesos that he order to give to the King of Futo that he order to be visited to make peace with those of Acomane'. In Torre do Tombo, *Corpo Cronológico, Parte II*, mç. 85, n. 9.

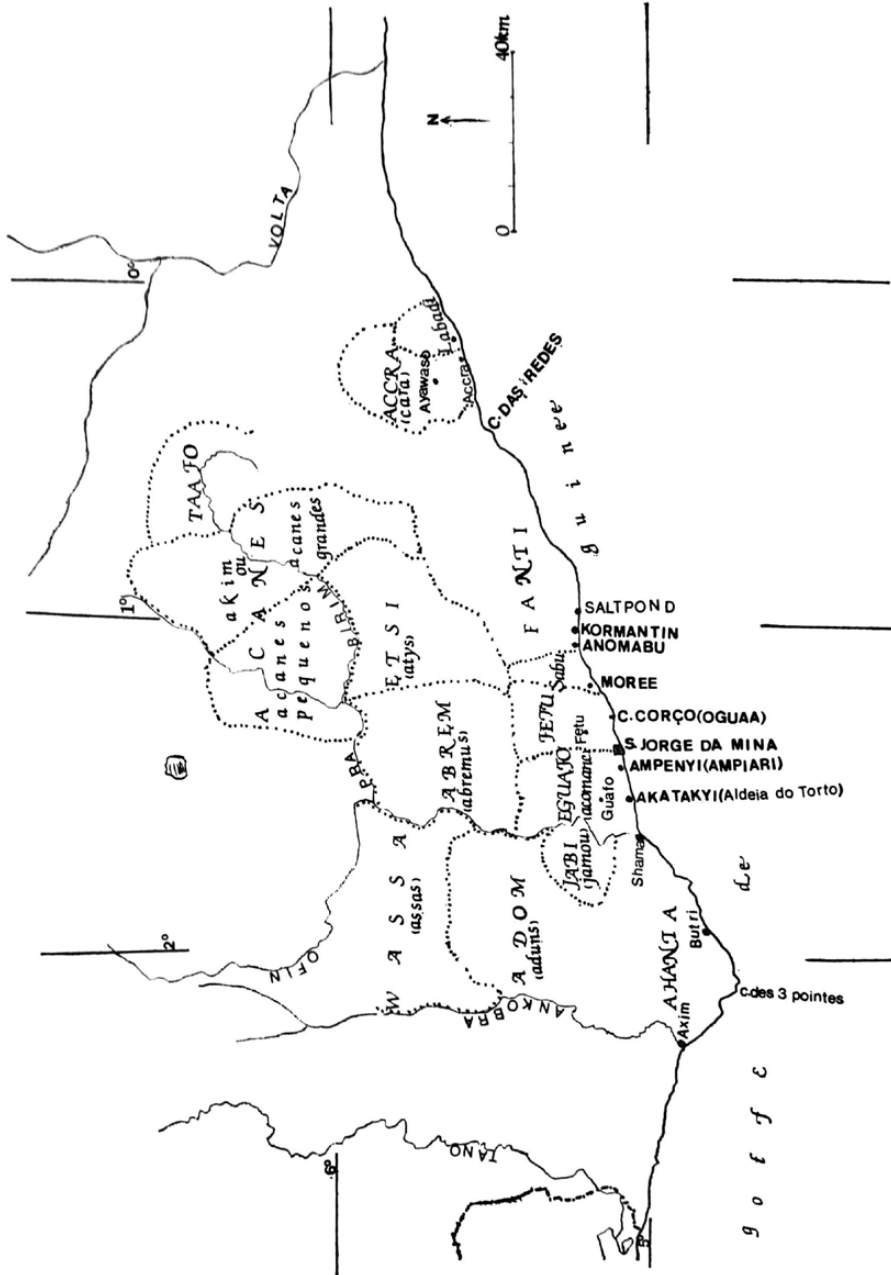


Figure 2. Map of the local groups in the Gold Coast, in Ballong-Wen-Mewuda (1993: 80).

(Assa), Acanes (Akim, Acan), Etsi (Antys, Atys), Abrem (Abremus), Sabu (Sebu) and Fanti (Fante).³⁰

The success of the Portuguese position depended on integrating itself effectively into this environment. As it was described in 1529 in a ‘*Regimento*’, or list of orders, directed to the captain of São Jorge da Mina,³¹ the only way to guarantee the maintenance of the castle was to encourage local people to see the personal economic benefits of peaceful coexistence.³² With this purpose, from one side, as their contact with other territories and villages beyond Eguafó and Futo was restricted, the *Regimento* reinforced the idea that the Portuguese should be capable of favouring any important indigenous chiefs, merchants or other representatives who would eventually come to the city. However, when considering the complications that conflict and competition between the local groups could produce, the settlement in Mina could be understood as a means for the ruler of Eguafó to reinforce or increase his own position in the region by limiting or facilitating access across his territory to and from the Portuguese market.³³ By regularly sending his representatives to visit the fortress, the ruler of Eguafó was able to maintain some control over the Portuguese establishment by demanding from them the kind of goods he desired. From the Portuguese perspective, maintaining positive relations with Eguafó and Futo would result in the free flow of traffic across borders and to their market, while from the local perspective these borders could be maintained or strengthened as a means of demonstrating each kingdom’s relative authority across the region. For both, the influx of the gold merchants on their way from the interior to the Mina fortress represented an opportunity that needed to be carefully managed.

Of course, because Portuguese economic activity in this region was not about the production of any goods but rather the exchange of products from Europe or other territories—as, for example, Asia—for products from the region—mostly gold—that were brought to São Jorge da Mina by African merchants from the hinterland, working to make and keep the peace with and between the local authorities was not for kindness, but more for the impracticability of any imposition. Thus, without the option of using military force to impose whatsoever they wanted, the Portuguese settlement was dependent on African merchants. This meant that the option of making São Jorge da Mina suffer some decline in traffic was easy for rulers who

³⁰ ‘se resguatom e compra aos negros que de longas terras este ouro aly trasem, os quaes som mercadores de diversas Nasções. S. Bremus, atis, hacanys, boroës, madiguas, cacres, andeses, ou souzos e outros muitos’ (Brásio 1952: 4).

³¹ Regimento do Capitão da Mina, Lisboa, 8 de fevereiro de 1529, published in Faro (1957). For a translation to English, see Birmingham (1979).

³² VI, chap. 39.

³³ Elbl (1992: 177).

might consider cutting the ways that led to the factory.³⁴ This was a strategy that served to send a message whenever the Portuguese were not corresponding to what the locals expected, regarding their behaviour or even an unsatisfactory trade. As this suggests, there was no way the Portuguese could control the trade and circulation of the Africans outside their fortress, much less to impose any sort of behaviour or response.

This situation resulted in limitations and difficulties for the Portuguese administration at São Jorge da Mina which did not drastically change over time. Indeed, rather than functioning to serve as a means of territorially securing the Portuguese position, being in reality nothing more than a fortress that served to uphold an economic agenda, we can see in the *Regimento* policies that aimed to achieve a secure position through the maintenance of imperial governance that protected the Portuguese position by protecting local African people. In this vein, it was determined that the captain should serve God and the king and treat with all rights both the African authorities and merchants who eventually would come to the factory.³⁵ That is to say, even if it was a Christian territory that belonged to the king of Portugal, for the maintenance of São Jorge da Mina it was central to respect and keep a good relationship with the locals—something recognised from the Costa da Mina to Lisbon.

The Portuguese had no control over the region, this was clear. The only way for the factory of São Jorge da Mina to prosper was to play by the local authorities' rules, understanding, respecting and following the local dynamics, and later on, to secure it against other Europeans—mostly the Dutch—in part through close military collaboration with local African people.³⁶ In the end, being recognised as one of the Portuguese empire's most profitable regions, it was a matter of not only making sure the Africans who would get access to the factory would be well treated, but also that the Portuguese there would follow the limits imposed, not trading directly in the village outside the fortress and respecting the restrictions stipulated from Portugal for the protection of the interests of the Crown. These efforts represented strategies designed primarily to obtain a great amount of gold through trade at the coastal fortress, as their circulation outside the fortress was no option and their territory was so limited. Not being in control over these relations, in order to sustain their presence

³⁴ Costa e Silva (2002: 154).

³⁵ 'O capitão que mandar a dita cidade, pera me nella haver de servir, deve ser pessoa de tal sorte e conciencia, saber e bondade, qual convem pera regimento de tenta importancia e que com resão se deva esperar, que assim vintamente fará o que deve, como seja sirviço de Deus e meu, e a dita cidade e moradores della governados e tratados com todo o direito, e assim os nregros e peçoas que a ella vierem' (Faro 1957: 407).

³⁶ Emmer (2003).

and their own factory, it was important that they understood what goods the merchants and the inhabitants of those lands desired most, and what prices they would give for them. After all, it became clear that the Africans would not accept whatever the Portuguese brought to them, and there would be no purpose for the fortress on the coast if local people had no interest.

Macao

In a small peninsula in the South of China, the ‘Island of Macao’, as it was called in the 16th and 17th centuries, was located on the estuary of the Pearl River with easy access to the commercially dynamic region of Guangzhou (Canton). More than anything, it was a port city formed by Portuguese merchants and consolidated by the establishment of a Luso-Asian community and the activity of Catholic missionaries—mainly Jesuits.³⁷ We do not find many records about Macao’s existence previous to its foundation and consolidation as one of the most important harbours in East Asia. Still, it seems likely that the region, by virtue of its location and privileged geography, served regional commercial purposes from at least the 15th century.³⁸

Besides the written sources, one of the only representations of the peninsula of Macao during the early Portuguese establishment is a drawing made by the Luso-Malay cartographer Manuel Godinho de Erédia, from the first decades of the 17th century (Figure 3).³⁹ This image, even if simple and disproportionate, illustrates some of the most important features of Macao’s foundation. First, the small dimension of its landscape and the connection of the ‘island’ to the continent; second, the Mandarin and the Portuguese neighbourhoods’ coexistence; third, the religious presence, identified by the existence of churches; and finally, the classification that this was a city that belonged to China (SIDADE DE CHINA).

This is how Macao was conceived and sustained, as a Chinese territory under Portuguese administration. During this period, it was by no means a Portuguese-only domain, and in reality, the government of the city was always reporting to the Chinese government.⁴⁰

³⁷ As shown by Elsa Penalva’s work, a major part of the Jesuits from Macao had the same surnames as the most prominent merchants from that port, what illustrates how these two groups were imbricated. See Penalva (2015).

³⁸ See Boxer (1991).

³⁹ Born in Malacca, Erédia studied in the College of the Society of Jesus in Goa, having written an early account about the Malay Peninsula and its region.

⁴⁰ See Fok (1991).



Figure 3. Manuel Godinho de Erédia, *Planta de Macau*, ca. 1615-c.1622, In Cortesão & Mota (1960: 4: 421).

Macao rose as a port of interest to the Portuguese in the first decades of the 16th century.⁴¹ The evolution of the city was such that by 1557 it had become one of the most important trading ports in Asia, and a central establishment for the Portuguese empire's economy.⁴² From 1586, the territory started to be identified as '*Cidade do Nome de Deus na China*' (City of the Name of God in China). A definition that, once again, emphasised Macao's condition as a Portuguese (Christian) city situated in Chinese territory.

This arrangement was only possible because of China's own imperial structure and interests. The centralised and dominant government based in Beijing, in the

⁴¹ Arrival by the 1530s at the latest, at least following what was registered in the Annals of the Ming dynasty. See Southeast Asia in Ming Shi-lu, an open access resource, accessible at <http://epress.nus.edu.sg/msl/>

⁴² Having first settled in Macao in the 1550s, only in 1557 the territory was conceded by the Chinese government to Portuguese merchants. See Barreto (2006).

northeast, invested in maintaining and protecting a strong national unity. This goal not only included the control over foreigners' presence in China, but also on controlling the maritime activity on the Chinese coastline. Still, as the trade at Macao was not only contributing but determinant for the provision of some goods, especially silver,⁴³ the authorisation and control over a Portuguese port city located in a small peninsula in the south (far from the capital), with easy access to an important river and to the China Sea, was deemed to serve Chinese objectives.

One of the most significant descriptions about Macao was registered in the anonymous book *Livro das Cidades e Fortalezas* (Book of the Cities and Fortresses), from around 1582.⁴⁴ This book was probably written by an individual with a large experience in the Portuguese empire with the purpose of informing Filipe I (Felipe II of Spain), king of Portugal from 1580,⁴⁵ about the condition of the Portuguese establishments then annexed to the Spanish empire. Macao does not appear in much detail, but the description about the territory makes the characteristics of the city and its relationship with China clear:

*And it was shortly that this village grew, so that today it has passed of two thousand neighbours, having less than twenty years that it began to be populated by the Portuguese, as before the Chinese did not consent it, nor to other foreigners. And it will always grow over time, because this island is a general scale of all goods that from India go to China, and from Japan and other parts of that East, and from them come to India.*⁴⁶

This fragment shows that the city grew fast, reaching the number of 2,000 residents at the time the book was written. A significant number for such a small area, consisting not only of Portuguese merchants and European missionaries but also a Chinese and a Luso-Asian community. As described, this was only possible after the Chinese consented their permission for the Portuguese establishment—the same term used in the description from Mina, where the construction of a proper trading post was only facilitated after its endorsement by the local authorities. More important, the author

⁴³ About the central role of China in the new dynamic of a world economy in the early modern world and the circulation of silver, see Flynn & Giraldez (1995), Frank (1998) and Atwell (2005).

⁴⁴ *Livro das cidades e fortalezas ...* (c. 1601), [Manuscrito], Biblioteca Nacional de España (c. 1601).

⁴⁵ The Iberian Union lasted from 1580 until 1640. For a study of Portugal in the Spanish monarchy, see Schaub (2001). For the Iberian commercial activities in Asia during the Spanish rule, see Boyajian (1993) and Valladares (2001).

⁴⁶ 'E foy em breve tempo crecendo esta povoação de maneira que tem hoje passante de dous mil vezinhos avendo menos de vinte annos que se começou a povoar dos Portugueses, por dantes os não consentirem os Chys na terra, nem a outros estrangeiros alguns, e irá sempre pollo discurso do tempo augmentandosse cada vez mais, por ser esta Ilha hua escala geral de todas as mercadorias, que da India vão para a China, e Iapão e outras partes daquelle Oriente, e dellas vem para a India.' In *Livro das Cidades e Fortalezas* (c. 1601: 74v).

understood that the settlement's growth rested on the commercial activity that was connecting China to India, Japan and other territories in Asia, making of Macao 'a general scale of all goods' from the region.

The Chinese government was concerned that Macao's existence could cause an attrition between the continent and the neighbouring coastal region of Canton,⁴⁷ but it seems likely that the Cantonese authorities had an important role in helping the Portuguese establishment in Macao. The internal conditions of China contributed for this opening, as until the 1560s, the Ming authorities had no forceful attitude in the sense of trying to cease the European presence. Instead of widespread resistance, a few specific matters were driving the government's attention: piracy, smuggling and the maritime commerce with foreigners. The Chinese had, historically, faced significant problems stemming from the activity of pirates, and when they first arrived in Chinese waters, the Portuguese were taken as such.⁴⁸ Macao and the neighbouring areas were indeed a common point of illegal activity of private merchants (foreigners and Chinese), making the Ming dynasty vigorously interfere in economic matters from the region, conditioning and directing the maritime trade at both regional and transnational levels.

In this context, as contact with foreigners was identified as harmful to China, the Chinese government needed an intermediary for the regional trade in Asia, and the Portuguese trading port in Macao filled this gap well, as more than to facilitate the trade with Europe it functioned in a network linked to other Asian markets.⁴⁹ The most important goods traded were Chinese silk, Japanese and American silver, and porcelain, and the most important routes were the one connecting Macao to Japan (Nagasaki), the Philippines (Manila, and from there to Spanish America and other places in Southeast Asia) and India (Goa).⁵⁰

Thus, with the interest of taking part of this trade while protecting China's internal security and unity, it was convenient for the Chinese to keep an agent who was a good mediator without presenting a political and military risk. The Portuguese

⁴⁷ 'Porque todos os navios estrangeiros, que vão a esta provincia de Cantam, hão de ir surgir ao porto desta Ilha de Machao, e daly fazem seus commercios com os da terra firma, por os não consentirem passar mais adiante, e por razão deste concurso de estrangeiros, que aqui há, concorrem das outras provincias de dentro do sertão da China, muitas mercadorias de toda sorte; Do que todo resulta ser esta povoação de Machao muy celebre en tracto, e aver nella grandissimo concurso de varias mercadorias de todo Oriente.' In *Livro das Cidades e Fortalezas* (c. 1601: 74v-75).

⁴⁸ See Souza (1986).

⁴⁹ More than the commerce with Europe, made via Malacca-Goa, the main source of profit for Macao was the Asian trade. See Lourido (2000), Flynn & Giraldez (1996) and Tremml-Werner (2015).

⁵⁰ Ptak (2003).

were exactly that. They had the power and means to sustain the trade among the Asian routes without representing any real hazard to the Ming authority.

After the Portuguese were effectively focused on Macao and trying to improve and expand their activities, the Chinese government started to become more vigilant in the sense of controlling Portuguese movements. This control resulted in a more military presence in the region—a clear message of China's resolution. The regional conditions that at first helped the creation and evolution of Macao as a Portuguese trading settlement culminated into a more assertive posture from the Chinese government, triggering a strategy of co-administration of the city that Fok Kai Cheong called 'Macao's Formula'.⁵¹ Yet, despite concerns about a foreign presence on Chinese soil, the foreign maritime commercial activity in the China Sea was crucial for China's commercial interests and for the security of their coastline. In practice, this meant that the Portuguese would be allowed to settle and promote the trade in Macao by responding to China's administration through the payment of taxes; that the government was committed to end possible collaborations between the Chinese and the Europeans; and that the Portuguese would be restricted to the limits of the city.

In this way, then, with immediate and practical implications, Macao was made possible and shaped by Ming China's plan of ensuring internal security and sovereignty through the guidelines established to regulate, limit and control their international relations even as they seemed to hand them to a foreign power. As recorded in the *Livro das Cidades e Fortalezas*, 'notwithstanding that the land belonged to the king of China, who had his officials there who received rights that are paid there, they are governed by the Portuguese Kingdom's laws'.⁵² This was one of the most important strategies. The Chinese government managed to keep its authority in respect to Macao not only from controlling the Portuguese presence within the peninsula—making sure they understood that the land belonged to China—but also through the implementation of a customhouse and a taxation system. As we saw in Mina, the European presence could be used by a local ruler to strengthen and enrich their own position.

In this respect, we can see how local conditions and political interests were factors that made the Portuguese establishment so controlled and limited, but, at the same time, were what at first made it possible. That is to say, security barred and restricted international relations and circulation in China, while it simultaneously allowed

⁵¹ See Fok (1978).

⁵² 'posto que a terra seja d'el-rei da China, que nela tem seus oficiais que recebem os direitos que se ali pagam, são governados pelas leis e ordenações deste reino de Portugal'. In *Livro das Cidades e Fortalezas* (c. 1601: 75).

Macao to exist as a port city exclusively dedicated to keep the Portuguese community and serving as one of the most important trading harbours in Asia.

From the Chinese point of view, Macao was a strategic establishment. It was naturally limited by its geography, making it easily controlled. The distance from Beijing was also significant, not being easily accessible for the Europeans. From the Portuguese side, too, this small peninsula was in a perfect location. It was close to Malacca and Nagasaki, having an easy connection to Manila, besides the entrance to the Canton province through the Pearl River. After all, Macao was created and sustained as an international harbour for the benefits it brought for both the Chinese and the Portuguese.⁵³

As mentioned before, another aspect to be considered when examining not only what made Macao possible, but also how the establishment survived for such a long time, is the fact that, from the end of the 16th to the 17th century, the Portuguese community in East Asia was mainly formed of a cosmopolitan Luso-Asian community. As registered in the *Livro das Cidades e Fortalezas*, ‘the residents are almost all Portuguese, and others are mixed Christian (*Cristãos mestiços*) and natural from China’.⁵⁴ This characteristic made the city more acceptable in a local context, and by consequence more competitive in relation to other Europeans—mostly Dutch and English. Still, this did not mean that they had an easier access to China, but that Macao could be more tolerated, holding these same proportions and activities for a long time.

Control over Macao was an example of how the Chinese government managed to take advantage of international commerce while stressing and fortifying China’s sovereignty. They received Europeans, interacted with them only as much as necessary, with the clear purpose of supplying China with the commodities that it desired. Showing that these characteristics did not change over time, in the last decade of Spanish rule over Portugal, in 1635, Antonio Bocarro,⁵⁵ the Chronicler-in-Chief and Inspector-General of the State of India in Goa, wrote his *Livro das Plantas de todas as Fortalezas, cidades e povoações do Estado da Índia Oriental* (Book of the Plans of All the Fortresses, Cities and Towns of the State of East India).⁵⁶ This collection intended to inform King Filipe III (Felipe IV of Spain) about the situation of the Portuguese

⁵³ See [Yangwen \(2011\)](#).

⁵⁴ ‘Os moradores da qual são quasi todos Portugueses, e outros Christãos mestiços e naturaes da China, que nella tem seus officiaes que recebem os direitos que aly pagão, são governados pellas leis, e ordenações deste Reyno de Portugal’. In *Livro das Cidades e Fortalezas* (c. 1601: 75).

⁵⁵ See [Boxer \(1956\)](#).

⁵⁶ Bocarro [Manuscrito] (1635); for a version in English, the description of Macao was published in [Boxer \(1942\)](#).

establishments in Asia, in which was included a rich description of the ‘City of the Name of God in China’:

This city is not well provided with supplies, having many cheap and fine goods in the hinterland, because, as we expect them from the hand of the Chinese, if they have any feeling about us, they take it from us, and those who are inhabitants there have no way to get them in other places.⁵⁷

Considering the structure of the Portuguese *Estado da Índia*,⁵⁸ Macao was a quite singular case, not only in its geographic, political and economic condition, but also to its vulnerable position in relation to China. As identified before in the case of São Jorge da Mina, the Chinese only needed to close the gate⁵⁹ that connected Macao to China to make the city unviable as a commercial centre. This disruption would cause chaos to its trading activities and also the supply of food and other basic necessities into the city. As such, with the territory dependent on local trade and supply, similar to what we have already discussed in relation to West Africa, the cessation of the trade with the port would alone be a strong message of any disagreement or discontentment:

Your Majesty has no other income in this city than that from the voyages, because the King of China, in whose land the city is, collects from there all the rights of everything else, is convenient to know: from the entrance of every kind of vessel that comes there with goods, they pay the measurement of it according to the size of the vessel.⁶⁰

Thus, with Macao so reliant on the trade with China, the visiting merchants performed a protagonist role in everything related to its administration and politics. Any intention of imposing an imperialistic attitude from the Portuguese perspective would collide with the Chinese government. Again, as seen before in the case of Mina, pragmatism played here a crucial role. For the survival of the Portuguese establishment, collaboration with the Chinese forces was necessary for sustaining Macao as a Portuguese city.⁶¹ From East Asia to Lisbon, the situation of Macao was held in this

⁵⁷ ‘De mantimentos não he tão provida esta cidade com aver na terra dentro muitos e bons e baratos, porq como os esperamos da mão dos Chinas em tendo qualquer sentimento de nos logo nos los tolhem sem terê aquelles moradores modo pera os irê buscar a outra parte avendoos em CochimChina que esta de Machao cem legoas ao sudeste, e tambem algum nas muitas Ilhas q sercão a pensinsula onde esta a Cidade de q os mais são abitadas’ (Bocarro 1635: 406).

⁵⁸ Term that designates the government of the group of Portuguese establishments and possessions from the eastern coast of Africa and Asia, formed in 1505. See Subrahmanyam (1993) and Thomaz (1994).

⁵⁹ Known as Border or Barrier Gate.

⁶⁰ ‘Não tem Sua Mage. outra Renda algua nesta Cidade mais que a das ditas viagens porq el Rey da China en cuja terra esta lhe arrecada os direitos de tudo o mais convem a saber da entrada de todo o genero de embarcação que aly venha com fazendas pagão a medição della conforme o tamanho da embarcação’ (Bocarro 1635: 408).

⁶¹ Lourido (2000: 236).

clear and objective way. The territory was, no doubts, Chinese, but its administration and government were under Portuguese authority. It was, by no means, a Portuguese colony, and it did not engage in any military intervention but rather depended on security negotiated with the government of China under a strict and well-regulated relationship. By playing the role as intermediary between China and other Asian markets and enjoying the porous border through the Luso-Asian community Macao proved a successful experiment in globalised securitisation. Even after the definite interruption of the Portuguese presence in Japan in 1640,⁶² Macao was consolidated as one of the most important international hubs connecting European and Asian powers through trade.

With time, the evolution of the settlement, and the necessity to fix better the limits of Portuguese control, Macao needed to be somehow restructured. One of the major motives was, rather than to defend it from the Chinese, to secure it against other Europeans. Indeed, the Portuguese concluded the construction of Macao's main fortifications (1622–38) following the Dutch attacks of 1603–22. This change was captured in a map drawn by Pedro Barreto de Resende, employee of the General Registry of Goa and personal secretary of the viceroy Miguel de Noronha, that was published in Bocarro's *Livro das plantas e fortalezas* (Figure 4).⁶³

Here, we have a clear example of how places were moulded with the purpose of making it more defensible. The threat from the arrival of other Europeans had long been a concern for the Portuguese authorities in Macao, as well as at other sites across the Portuguese empire. The importance of Macao to commerce in the China Sea, its limitation in terms of territory and support from other parts of the Portuguese empire, and the growing competition with the Dutch and English in East Asia, made the construction of fortresses and walls a matter of turning the city more protected and secure.

*The walls that this city has were almost finished by Dom Francisco Mascarenhas, the first captain-general who she had and who made the most of these works. However, the Chinese, as they are so suspicious, made us to demolish a large part of them, of those that to the side of the land, that were running from the so-called fort of São Paulo, seeming to them that they were being made against them.*⁶⁴

⁶² In 1640, the Tokugawa Shogunate (running since 1603) struck the last blow to Japan's international relations, starting the isolationist foreign policy period known as *Sakoku* (closed country), that lasted more than 200 years.

⁶³ Bocarro (1635: 402).

⁶⁴ 'Os muros que tem esta Cidade estão quasy acabados por Dom Francisco Mascarenhas o primeiro Capitão geral que teve e que lhe fez as mais destas obras porê os Chinas como são tão desconfiados fizeram derrubar grão parte delles dos que estão pera a banda da terra que hião correndo do dito forte de Sam Paullo pareçendolhes que contra elles he que se fazião' (Bocarro 1635: 407).



Figure 4. Map of Macao by Pedro Barreto de Resende (15?–1651), in Bocarro (1635: 402).

However, from the Chinese perspective, these fortifications were a cause for suspicion and concern. From Bocarro's narrative, we learn how the Chinese made the Portuguese destroy a significant part of the walls, from the side that faced the continent, to demonstrate that it was not designed to deter the Chinese. As such, the Portuguese were left with fortifications against maritime threats, accepting that their security was more easily ensured by maintaining a good relationship with the Chinese than trying to defend against them militarily.

As Bocarro affirmed, considering their vulnerability in terms of numbers and military power, as well as their dependence on the Chinese supplies, the 'peace that we have with the King of China is as he wants it, because, as he ... has such a great power much bigger than the one the Portuguese could gather there, never, no matter how many scandals we may have from them, was there any thought of breaking our relationship'.⁶⁵ This was a pragmatic and clear description, as the Portuguese settlement in Macao responded to the Chinese authority, following their demands and rules—after all, the power was disproportionate—and no matter how many 'scandals' they faced, cutting their relationship was never seriously considered.

⁶⁵ 'A pas que temos com o Rey da China he conforme elle quer porque como esta tão desviado da India, e tem hum poder tão aventejado a todo o mayor que os Portuguezes puderão la ajuntar em nº de gente, unca por mais escandolos que tivessesmos delles ouve nem pençamento de chegarmos a rompimento porq so com nos tolher o mantimento consumira a nossa Cidade por não aver parte nê com que os hir buscar' (Bocarro 1635: 410).

Conclusion

In both Macao and São Jorge da Mina, Europeans' presence was authorised or tolerated by the locals in the meantime they were beneficial to them and do not harm their position. Considering their fragile establishment, the Portuguese activity was not then guided by a grand discourse of civilising the 'other'⁶⁶ but rather by creating mechanisms and factories to facilitate a profitable enterprise from exploring a good relationship with locals and consequently their existing commercial networks.

In both West Africa and China, then, the Portuguese presence was made possible and secured through the concession of a limited settlement by the local populations, and in order to survive and prosper the Portuguese had to operate within the parameters of the mutually beneficial relationships that had first allowed them to stay: commercial relations based on providing commodities demanded by local people. By proving themselves a useful asset in a globalising environment, the Portuguese were secured against actors in each region that otherwise may have chosen to reject and resist their presence. A key point in analysing the two cases is precisely to understand how both territories were built and how they were formed around and within local communities. It was clear where the limits of Portuguese authority ended, and their success or failure depended on who would access the areas designated to them and who might refuse to do business. In this way, we can see processes where African, Chinese and Portuguese actors in these sites constructed borders and boundaries that protected their respective positions from inside out. Most importantly, the establishment of borders can be understood as measures designed to regulate, control and limit the movement of people and commodities from the outside as much as about demonstrating territorial authority. Trade was the main element of Portuguese activity in both São Jorge da Mina and Macao, neither of which underpinned serious efforts at further imperialistic expansion. The two territories were connected to other routes, being served with the trade of goods from distinct regions. Besides that, the commercial activity relied on a series of political-administrative measures that made the Portuguese establishment acceptable by the local authorities, as well as recognised by its competitors. A negotiation that was significantly influenced by the idea of security.

A comparison between these two experiences show how the Chinese case was not completely exceptional within the Portuguese empire, even if the precise details of the settlement were unique. Like Macao, the factory in São Jorge da Mina was also considered one of the most important territories for the empire in the first half of the 16th century. But, as in Macao, it was one in which the Portuguese establishment was dependent on local authority and engagement. This idea confronts the discourse of

⁶⁶ Fed by a distorted image from the West towards the East denounced by Edward Said in his study on Orientalism (1978).

inferiority and passivity on the part of African populations in globalisation during the early modern period. After all, São Jorge da Mina was recognised as being in a region where the Portuguese had little power beyond their small, peninsular-bound fortification and they had to follow the rules imposed on them, adapting their presence to serve and sustain their establishment in similar ways to Macao.

As these case studies have shown, even though security studies and securitisation theory are rarely utilised to study non-state-centric conditions, they present an interesting filter to think how the trading posts and limited establishments considered here were formed through processes that sought to facilitate exchange despite definitions of rigid borders and well-demarcated groups. The two territories were not fully Portuguese in terms of their organisation or authority, having also served as a strategic trade ports for commercial intermediation with the local markets from West Africa and China. Their interdependence with local actors sustained their security as much as it did their success, not only for Portugal but also for local authorities and peoples.

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