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Perspectives on the economic and political history of the Ross Sea

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ABSTRACT

The paper analyses the economic and political history of the Ross Sea, where exploration, science, commercial exploitation, politics and adventure became highly interlinked and interwoven. Expedition accounts and the extensive literature on Antarctic history and politics inform the contextual aspects. The archives of the Norwegian whaling company A/S Rosshavet, established in 1923, and the United States of America and New Zealand archival material from the 1950s are key sources. From the first whaling season onwards, the impact of Antarctic whaling, and later scientific bases, highlights and illustrates the tensions between Antarctic commerce, territorial claims and international politics.

KEYWORDS

Antarctica; Ross Sea; history; whaling; territorial claims

1. Introduction

The discovery by Captain James Clark Ross RN, in 1841, of a deep cut or indentation in the Antarctic continent south of Aotearoa, New Zealand, revealed access to the southernmost part of the coastline.¹ This provided a gateway to the early explorers who ventured onto the continent to reach the South Pole. Ross encountered large stocks of whales, that would later attract Norwegian whalers who would subsequently commence pelagic whaling; the catching and processing of the whales on board ships, in contrast with land-based processing. Whaling accelerated Antarctic territorial claims and, in 1923, the Ross Dependency was established by a British Order in Council and placed under the administration of the New Zealand Government. Norwegian whaling in the Ross Sea would last until 1933. In the aftermath of World War II, the Soviet whaling fleet would venture into the Ross Sea for a brief period. From the mid-1950s, the Ross Dependency became a significant hub for polar science, dominated by the United States of America and New Zealand.

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¹'Aotearoa New Zealand' is increasingly recognised as the right and proper name of the nation. This paper acknowledges this development, and instances where this complete name is not used, are due to the historical contexts within which only 'New Zealand' was utilised in material cited or related context.

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This paper analyses the geopolitical, economic, cultural and human histories of the Ross Sea, and demonstrates ways in which exploration, science, commercial exploitation, politics and adventure are profoundly interlinked and interwoven.² In the paper's title, we have used the term *Perspectives*, indicating a broad approach to the analysis. The primary focus is on the development of the whaling industry. Whaling has by far been the most extensive economic activity in the region, and as we will see, it had a decisive influence on political developments. The archive of the Norwegian whaling company A/S Rosshavet, established in 1923, is a crucial source.³ The period around its founding and the first whaling season highlights and illustrates the tension between commerce, territorial claims and international politics. These tensions were still evident in the decades that followed when the United States of America (U.S.A.) increased its presence in the area. A perspective of our analysis is thus also the importance of what may be termed a third party (Norway, later the U.S.A.) to which New Zealand (and Britain) had to relate. We examine these developments until the establishment of the Antarctic Treaty in 1959, when a new political regime of Antarctic nations altered the dynamics between these and other nations in the region.

Another perspective in the following analysis relates to new directions in historical studies of the ocean, particularly the concept of 'oceanic history'.⁴ Such research offers inclusive perspectives, especially on how people that populate the surrounding landmasses have used the sea and how it has prevented or facilitated interaction between them. However, the Ross Sea, like the other seas surrounding the Antarctic continent, differs from most other maritime regions for one obvious reason: The region had no indigenous population and no permanent population; the occupants being transitory explorers, scientific base staff and modest numbers of tourists. Therefore, human history is all about visitors. Antarctica, surrounded by the ferocious Southern Ocean, explains another peculiarity in contrast to most other oceans; Antarctic human history is comparatively recent. The closest populated region to the Ross Sea is Aotearoa New Zealand, about 2500 km north of the Antarctic continent. This 'proximity' is crucial in explaining the territorial claim and many other aspects of the historical development of exploration and exploitation in the region.⁵ The vast Southern Ocean that divides Aotearoa New Zealand from the Ross Sea includes several remote sub-Antarctic islands that became part of Aotearoa New Zealand's domain. Such aspects of this history may also be studied in the context of ocean history.⁶

²Any broad account of the history of the Antarctic region includes extensive coverage of the Ross Sea for obvious reasons; it was the core area of attention during the 'Heroic Age' of Antarctic exploration. Some accounts also focus explicitly on the Ross Sea, for example, Quatermain, *South to the Pole*. See also Hatherton, *Antarctica*.

³The extensive company archive of A/S Rosshavet, founded on 12 April 1923, covers the period from the initial preparations in 1922 to 1980, when the company was restructured. The archive is located at Vestfoldarkivet, Sandefjord, Norway.

⁴Recent contributions using this term include Armitage, Bashford and Sivasundaram (eds.), *Oceanic Histories*. The collection contains one relevant contribution: Antonello, 'The Southern Ocean'.

⁵Several historical accounts and analyses of the Ross Sea from an Aotearoa New Zealand perspective will be referred to in the following: Auburn, *The Ross Dependency*, Quatermain, *New Zealand and the Antarctic*, Logan, 'Cold Commitment', Templeton, *A Wise Adventure*.

⁶Maddison, 'People, Nature and the Southern Ocean'.

The maritime history of the Ross Sea nevertheless also relates to traditional maritime history or diplomatic history, where globalisation is studied in the context of the European maritime empires as drivers of development.⁷

2. The Ross Sea defined

A sea or an ocean is usually defined or limited by surrounding coastlines. The Ross Sea has coastlines on two sides; Victoria Land on the west and Marie Byrd Land on the east (see Figure 1).

The northern and southern boundaries are more problematic in terms of definitions. A large ice shelf permanently covers the inner (southern) parts of the Ross Sea; the Ross Ice Shelf of about 500.000 km² extends from about 78° to 85°S. This is not sea ice, but the continental glacier ice that floats into the sea. The extensive ice barrier of about 800 km can be considered a coastline for all practical purposes. Nevertheless, the shelf covers a large sea, roughly equivalent to the size of France. In scientific terms, the distinction between the two parts may be apparent. However, in political terms, it has been less clear when defining the extension of sovereignty and governance. Thus, this somewhat unclear distinction between sea and ice is also a perspective or an element in the analysis of the economic and political history of the Ross Sea. We will return to this interesting issue.

When it comes to the northern boundary of the Ross Sea, there is no precise definition. The Ross Sea joins the vast Southern Ocean, which then joins the South Pacific

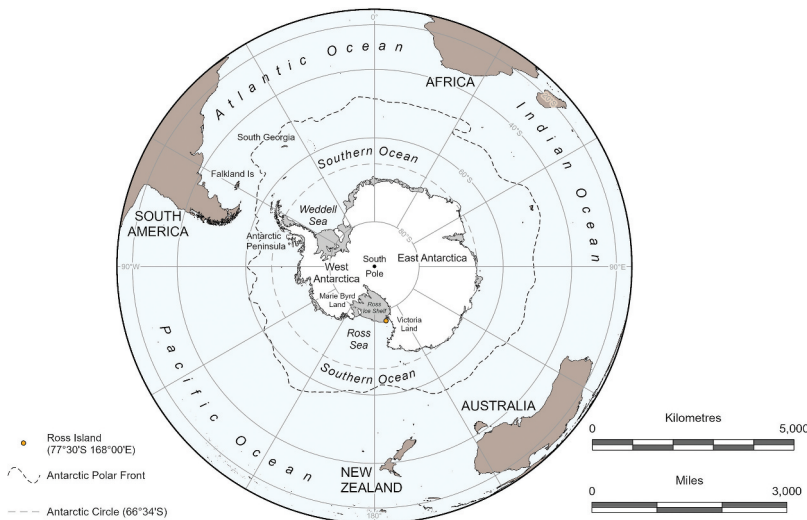


Figure 1. The Antarctic and the Ross Sea.

Source: Map produced by Bonnie Pickard, Mapping and Geographic Information Centre, © British Antarctic Survey, UK Research and Innovation, 2023. Antarctic coastline from the SCAR Antarctic Digital Database, accessed 2023. Polar front data taken from South Georgia GIS, accessed 2023. World countries made with Natural Earth’.

⁷A discussion of ocean history versus maritime history (and a defence for the latter); Harlaftis, ‘Maritime history’.

Ocean in this region of the world. A definition is usually associated with ice, but this time with the northern limits of the sea ice (pack ice). The extension of the pack ice decreases throughout the summer season and varies from year to year. So, it may be the zone or pack ice 'belt', typically located between 60° and 70°S. During the summer, the sea south of about 70° is open to the ice barrier. This can be considered the 'core' Ross Sea. Another definition of the Ross Sea's northern extent is the continental shelf's edge that follows the circular continental outline of Antarctica, also at about 70°S.⁸

3. 19th-century encounters

The first encounters with the region are not the focus of this paper, but they obviously paved the way for both commercial and political development and will be briefly chronicled. The British Naval Expedition (1839–1843), led by James Clark Ross, was a scientific expedition. Its prime aim was to make magnetic observations and determine the position of the south magnetic pole. The vessels H.M.S. *Erebus* and H.M.S. *Terror* circumnavigated the Antarctic continent and, most importantly, in our context, penetrated for the first time what became known as the Ross Sea.⁹ The expedition had lasting and significant consequences for all aspects of the further exploration of the Ross Sea region. One of them was the influence on the development of the whaling industry. Ross' encounters with whales became widely known, and by around 1890, several initiatives were taken to explore the whaling opportunities in the Antarctic region and the Ross Sea specifically.¹⁰ One of these initiatives originated from Australia and is associated with Henrik J. Bull. He was a Norwegian businessman working in Melbourne, where he became engaged in discussions on whaling in the Ross Sea. He returned to Norway where he approached Svend Foyn, the 'grand old man' of whaling, with his plans. Foyn was interested and financed an expedition with the vessel *Antarctic* – with Bull as the expedition leader. During the Austral summer of 1894/95, the expedition reached 74° S. Large stocks of whales were encountered, and Bull formulated a direction for developing commercial whaling.¹¹

In the cultural, if not political, history of the Ross Sea (and indeed, Antarctica), the expedition achieved fame by claiming the first landing on the Antarctic continent. This occurred at Cape Adare in Victoria Land, at the entrance to the Ross Sea (at about 71° S). A small rowing boat was used for the landing, with four people on board: Alexander Tunzelman, a sailor from Stewart Island; Leonard Kristiansen, the ship's captain; Carsten Borchgrevink, the assistant biologist; and Bull himself. Three of them (except Bull) claimed they had been the first ashore, and the disagreement reached the press in Norway and internationally. The debate was in vain as Headland remarks laconically:

⁸*Encyclopedia Britannica*, Riffenburgh, ed., *Encyclopedia of the Antarctic*. On the extension of the pack ice, refer to the *Antarctic Pilot*, various editions. An internal memo in the whaling company A/S Thor Dahl reviews the pack ice based on observations from several whaling expeditions as well as several editions of *Antarctic Pilot* from the 1930 and throughout 1940, and concludes that the pack ice typically extends from 62° and 70°S; *Isforholdene i Rosshavet* (The Ice Conditions in the Ross Sea), Memo from T.T. (A/S Thor Dahl), 21.01.1949, author's archive.

⁹The expedition is chronicled and analysed in any standard work on the history of Antarctica. The expedition's official account is Ross, *Voyage of Discovery*.

¹⁰The Ross' expedition in the context of the further commercial and economic history of the Antarctic region, see Basberg, 'Commercial and economic aspects of Antarctic exploration', 218 ff.

¹¹Bull, *The Cruise of the Antarctic*.

‘They dispute an empty claim – for there had been at least five earlier landings by sealers’.¹²

Carsten Borchgrevink was soon to become involved in more debates and controversies. He initiated and led the British Antarctic Expedition (*Southern Cross*) (1898–1900), where a shore party of ten men built two huts at Cape Adare and wintered there (1899/1900). The expedition was significant in many ways. It was the first planned overwintering on the Antarctic mainland, and an extensive scientific programme was undertaken. Furthermore, a dog-sledge journey from the Ross Ice Shelf reached the farthest south at 78.83°. However, the expedition – and Borchgrevink – struggled to be accepted. Being a Norwegian citizen, he failed to attract the support of the influential Royal Geographical Society, and the expedition had to be privately financed. It also competed with Sir Clements Markham’s plans that were supported by the British polar establishment (with the telling name the British *National* Antarctic Expedition).¹³ Although *Southern Cross* was flying a British flag, and the British flag was raised at Cape Adare, the majority of the expedition members were Norwegians. Nevertheless, Borchgrevink also struggled to make himself a polar hero in Norway. At least one reason was that he did not fly the right flag – in this period of Norwegian political history where nationalism and independence were the top issues.

4 The ‘Heroic Age’ and polar imperialism

Although James Clark Ross’s expedition of the 1840s reflected the global power and ambitions of Britain at the time, Britain’s more conscious political strategy in Antarctica emerged later – starting in the ‘Heroic Age of Exploration’ of the late 19th century and the two first decades of the 20th century. In this period, associated with the expeditions by Scott, Shackleton, Amundsen and others, the Ross Sea and the Ice Shelf became the preferred gateway to explore towards the South Pole. These endeavours, in most instances, incorporated territorial claims.¹⁴

Borchgrevink, during the British Antarctic Expedition, hoisted ‘the first flag on the great Antarctic Continent. It is the Union Jack of Great Britain’. The expedition also took possession of Duke of York Island (off the coast from Cape Adare) ‘under the protection of the Union Jack’.¹⁵ Robert F. Scott’s British National Antarctic Expedition (1901–04), based at Hut Point, Ross Island, extensively explored the Ice Shelf and surrounding land. Surprisingly, it did not result in any formal territorial claims. However, the next British expedition to this region, Ernest Shackleton’s British Antarctic Expedition (1907–09), made a formal claim. From its base at Cape Royds, Ross Island, a sledge party ventured almost to the pole (88°S) and took possession of the Polar Plateau for King Edward VII on 9 January 1909. Apparently, it had no formal consequences. When Roald Amundsen and his team reached the South Pole on 14 December 1911, they claimed the South Polar Plateau for Norway and named it Kong Haakon VII Land (or Vidde). A group of

¹²Headland, ‘Earliest Antarctic Landings’, 18. See also Headland, *A Chronology*.

¹³An explicit focus on Borchgrevink’s expedition in the context of other attempts and expeditions at the time: Baugham, *Before the Heroes Came*, 77 ff.

¹⁴There is an extensive literature on the expeditions of this era, ranging from contemporary accounts to numerous later histories. We will not review that literature here and only refer to brief accounts of the expeditions in Quartermain, *South to the Pole* and *New Zealand and the Antarctic*. See also Headland, *A Chronology*.

¹⁵Borchgrevink, *First on the Antarctic Continent*, 99 and 180.

Amundsen's colleagues that had remained at Framheim Hut, by the Bay of Whales, explored King Edward VII Land on the eastern side of the shelf and took possession of it for the Norwegian King. Captain R.F. Scott and four colleagues of the British Antarctic Expedition (1910–13) also reached the South Pole from their base at Cape Evans, Ross Island but realising that the pole had been reached, by Amundsen and his party just a month earlier, did not make any further territorial claims.

Other nations with imperial ambitions also explored the Ross Sea region during this period. A Japanese Antarctic Expedition (1910–12) led by Nobu Shirase, also based in the Bay of Whales, sledged across the ice shelf and on King Edward VII Land – and claimed it for Japan. Then Douglas Mawson's Australian Antarctic Expedition (1911–14), based at Cape Denison on the western shore of the Ross Sea, explored inland, claiming it for Britain in 1912 and naming it King George V Land and Queen Mary Land.

Expeditions of the 'Heroic Age' established bases around the Ross Sea, ranging from Cape Adare in the west, to the Bay of Whales on the eastern side of the Ross Ice Shelf. However, Ross Island was clearly the best location for a base. It is the southernmost accessible land in Antarctica, with sheltered anchorages and large areas of solid ground upon which structures could be erected and stores placed. The two expeditions led by Scott and one led by Shackleton established their bases there. They explored the region around the island, ranging to Cape Adare in the north, attaining the first ascent onto the Antarctic ice sheet, and discovering the Dry Valleys. These expeditions were portrayed as expressions of British territoriality and included investigations into the economic potential of natural resources. In 1911, members of Scott's second expedition encountered Roald Amundsen's South Pole expedition at the Bay of Whales. Amundsen had avoided a difficult situation by not establishing his base on Ross Island, an area already considered 'British'. It was evident that the Ross Sea had become the pre-eminent route to access the interior of Antarctica. Concerning Antarctic territorial claims, nothing was internationally agreed upon during the 'Heroic Age'. As we shall see, attempts at formally establishing sovereign control commenced during the 1920s and the arrival of the whalers.

5. Territorial claims and the first whalers

On 21 December 1922, the British Government issued a licence to the Norwegians C.A. Larsen and M. Konow to start whaling in the Ross Sea. They established the whaling company A/S Rosshavet on 12 April 1923, and their whaling expedition left Norway for the Ross Sea in September. Seven months after the licence was issued, the Ross Dependency was formally established by a British Order in Council on 30 July 1923, placing the administration of the Ross Dependency under the New Zealand Government; through the Crown's representative, the Governor-General.

The whaling initiative and the territorial claim were intimately linked and interwoven. The issue was complex, and international negotiations between governments, and internal discussions between government and businesses lasted for many years and have been studied in detail by several historians.¹⁶ We will not go into all aspects of this intricate

¹⁶Quartermain, *New Zealand and the Antarctic*, 40ff. A detailed analysis using New Zealand Government sources is Logan, 'Cold Commitment'. See also Barr and Watt, 'Pioneer Whalers in the Ross Sea', 281–304. With a perspective from Norway and the whaling industry; Tønnessen and Johnsen, *The History of Modern Whaling*, 346ff.

matter but highlight some issues of relevance for the broader understanding of the region's cultural, economic and political history.

Both the British ambition to gain sovereignty of the region, as well as the Norwegian whaling plans, originated much earlier. Indeed, the British Government made plans from 1920 onwards to get control of the entire Antarctic continent.¹⁷ Regarding the Ross Sea region, strategy and plans originated in London. New Zealand was, at this point, a self-governing dominion within the British Empire, while New Zealanders remained British citizens. New Zealand, and the other dominions, increasingly pursued their respective endeavours, and the United Kingdom had to reach an agreement on Antarctica among the dominions. From 1920, there was much discussion between Britain, New Zealand and Australia as to what role the two former colonies should have in the future governance and political structure in Antarctica.¹⁸

Norwegian plans to start whaling in the Ross Sea area had been discussed for a long time. H.J. Bull had considered whaling there since his 1895 expedition. It is not known precisely when C.A. Larsen first had the idea, but he spoke to his friend and future business partner Magnus Konow about it in 1913 – the year before Larsen left South Georgia.¹⁹ Things began to materialise when Konow involved his whaling business partners Johan Rasmussen and Olaf Hanssen. They asked the Norwegian Ministry of Foreign Affairs, in Oslo, to investigate the sovereignty issue.²⁰ Interestingly, at his point, the Ministry considered the Ross Sea as 'terra nullius'. However, when consulting the Norwegian Minister (Ambassador) in London, Paul B. Vogt, they received a contrasting view. He was of the opinion, probably after discussing the issue with British colleagues, that this was British territory, and he referred to the discoveries by Ross. To avoid compromising British-Norwegian relations, the Norwegians decided to apply for a whaling licence.

Larsen and Konow travelled to London in June 1922 for meetings with the Colonial Office. The application for a whaling licence in the Ross Sea was submitted simultaneously, initiating a hectic period of contacts and negotiations between the Norwegian business people and the British Government and involving the Norwegian Government via the Legation in London.²¹ The application also led to hectic activity on the British side, involving the Colonial Office (The Under Secretary of State), the New Zealand Government in Wellington and the New Zealand High Commissioner in London about licence conditions, practicalities regarding how the application should be handled, where the responsibility should rest; in London or Wellington, and broader issues about sovereignty and territorial claim.²²

A draft licence was presented for Larsen and his colleagues on 5 September.²³ It suggested detailed conditions for the whaling operations that were modelled after the licence system adopted in the Falkland Islands Dependencies over almost 20 years. The

¹⁷Logan, 'Cold Commitment', 5ff. describes it as a 'secret' plan. See also Templeton, *A Wise Adventure*, 15ff.

¹⁸Logan, «Cold Commitment», 21.

¹⁹Risting, *Kaptein C.A. Larsen*, 109.

²⁰The Norwegian edition of Tønnessen and Johnsen, *The History of Modern Whaling (Den moderne hvalfangsts historie* (vol. III), 268ff) has a detailed account of the contact between Larsen and his colleagues and the Ministry, based on the Ministry of Foreign Affairs archives. See 582. The exact date is not known.

²¹Tønnessen and Johnsen, *Den moderne hvalfangst* (vol. III), 270.

²²Templeton, *A Wise Adventure*, 20.

²³A/S Rosshavet archives (Ad-L0011).

Norwegians, however, wanted better terms based on ‘the great risks of such expeditions, owing to unknown ice conditions, &c’.²⁴ They sought permission to catch Right whales in addition to the rorquals. They also wanted permission to retain only the blubber and dispose of the meat and carcasses overboard if working conditions were too difficult. This meant that they hoped to avoid the requirements of so-called full utilisation.²⁵ Thirdly they wanted to exclude other whalers, and have the whaling grounds for themselves:

‘[...] we beg to apply for the sole right to catch whales in the above-named territories for a period of at least five years. It will be very difficult, otherwise, to raise the necessary capital at once, and we consider it reasonable that we, as the first to go out and explore a new and unknown field for the whaling industry, should get no advantage before the arrival of other Companies who, using our experience, may later on be granted licences in the same waters’.²⁶

This question about a de facto monopoly was left to the New Zealand Government, and as late as the middle of December, Larsen requested a decision.²⁷

The New Zealand Government also had another request from the Norwegians that took time to resolve. In addition to the Ross Sea, Larsen and his colleagues wanted to take whales around Campbell Island and use the island as a base. In a letter to the High Commissioner for New Zealand, in September, Larsen argued: ‘The success of our Company just as well will be in the interest of the New Zealand Government, we trust that you will give us such permission in the work to start the whaling Industry in this new and unknown field on your territories’.²⁸ In November, the Commissioner had to regret that it took time to get a response from the New Zealand Government in Wellington, and that the matter had to await settlement until the expedition reached New Zealand.²⁹ In the end, permission was never granted. A similar application to the Australian Government for whaling around Macquarie Island had the same fate.³⁰ Both initiatives show, in the context of a broad (‘oceanic’) perspective on the Ross Sea, that the wider Southern Ocean, to some extent, was an integrated part of the business model of the Ross Sea whalers.

After much diplomatic work, the licence for whaling in the Ross Sea was issued on 21 December 1922.³¹ The five-year exclusive right was not accepted, but other than that, the Norwegians could be happy with the outcome. The licence was given for 21 years for two factory ships with five catcher boats each. All species of whales could be taken for the

²⁴Letter from C.A. Larsen to The Under Secretary of State, Colonial Office, 26 September 1922, A/S Rosshavet archives (Ad-L0011).

²⁵This had been an important management principle introduced by William Allardyce for the Falkland Islands Dependencies; see Hart, *Whaling in the Falkland Islands*, 19ff.

²⁶Letter from C.A. Larsen to The Under Secretary of State, Colonial Office, 26 September 1922, A/S Rosshavet archives (Ad-L0011). The text (a copy of the original letter) may contain a misspelling. ‘Reasonable’ should probably be ‘unreasonable’ to get the intended meaning (Author).

²⁷Letter from The Under Secretary of State, Colonial Office, to C.A. Larsen, 12 December 1922, A/S Rosshavet archives (Ad-L0011).

²⁸Letter from C.A. Larsen to The High Commissioner for New Zealand, London, 26 September 1922, A/S Rosshavet archives (Ad-L0011).

²⁹Letter from The High Commissioner for New Zealand to the Norwegian Legation, London, 8 November 1922, A/S Rosshavet archives (Ad-L0011).

³⁰Letter from The Norwegian Legation in London to The High Commissioner for Australia, London, 26 September 1922, A/S Rosshavet archives (Ad-L0011). The 26 September was obviously a day of hectic letter-writing for the Norwegians in London!

³¹It was approved by The Secretary of State for the Colonies, Lord Devonshire, 21 February 1923; Barr and Watt, ‘Pioneer Whalers’, 282.

first five years, and requirements for full utilisation were eased. Both these conditions were more liberal than in South Georgia and the South Shetland Islands.

The successful result of the negotiations owed much to C.A. Larsen himself. The written report from the foundation of A/S Rosshavet summarises his role: The initiative came from Larsen. First, he alone, then in company with Magnus Konow, through correspondence and personal negotiations in London, finally managed to land the agreement.³² Although not an entirely unbiased source, it probably captures the essence. One obvious reason for his success was that he had previous experience dealing with the British Government on similar matters, when he initiated whaling in South Georgia in 1904, and there also had to apply for a licence and cope with the still unresolved British sovereignty. Larsen had mostly manoeuvred in these unchartered diplomatic waters without friction with the British Government.³³ In a letter to the Colonial Office from the Norwegian London-based businessman and shipbroker, Sir Karl A. Knudsen supported Larsen's application and argued for an exclusive licence: 'I know the sympathy with which the Colonial Office looks upon Captain Larsen, so that it is not necessary for him to plead his cause'.³⁴

The sovereignty issue was still unresolved when the licence was issued in December 1922. But the licence, as Logan puts it, 'added urgency to the question'.³⁵ Tønnessen and Johnsen write that the British claim and the foundation of the Ross Dependency came as a reaction to the Norwegian request for a whaling licence.³⁶ Templeton remarks: 'Not surprisingly, Norwegian historians have seen the creation of the Ross Sea Dependency entirely as a reaction to the application of C.A. Larsen . . .'.³⁷ As we have seen, while British plans for sovereignty emerged earlier, the actual *timing* of the claim was a reaction related to the whaling initiative.

The issue of the licence also sped up the planning for founding the whaling company. Indeed, the next day, 22 December 1922, the invitation for subscription of shares for the founding of A/S Rosshavet was ready and signed by Larsen, Konow and Rasmussen, together with four other initial subscribers.³⁸ It must have been in preparation for some time.

The document is an engaging read, obviously worded to attract potential investors. It first refers to the main points of the licence given in very favourable conditions ('meget gunstige betingelser'). It then reviews Larsen's extensive experience in the Antarctic as an expedition leader and whaler. However, it also reads like a summary of Ross Sea exploration from the 1840s and onwards, focusing on observations of whales. There are quotes from Ross and his scientists Robert McCormick and Alexander Craig, Emile Racovitza, Bull, Scott, Shackleton's biologist

³²Innbydernes beretning om stiftelsen av hvalfangstaktieselskapet 'Rosshavet', (The founders' report on the foundation of the whaling company Rosshavet), Sandefjord 12. April 1923, A/S Rosshavet archives (Ad-0011).

³³Larsen even (in 1910) took up British citizenship; Tønnessen and Johnsen, *Den modern hvalfangst* (vol. III), 269. However, in the very first years of operations, there were, indeed, some tension and conflicts, exemplified by the symbolic Royal Navy visit to Grytviken in 1906 when Larsen was instructed to lower the Argentine (or Norwegian – this is not clear from the sources . . .) flag; Hart, *Pesca*, 2001, 81.

³⁴Letter from K.A. Knudsen to J.F.N. Green, Colonial Office, London, 22 September 1922, A/S Rosshavet archives (Ad-L0011).

³⁵Logan, 'Cold Commitment', 31.

³⁶Tønnessen and Johnsen, *Den modern hvalfangst* (vol. III), 268; ' . . . henvendelsen til England om konsesjon ga støtet til opprettelsen av the Ross Dependency', s.a., *History of Modern Whaling*, 347.

³⁷Templeton, *A Wise Adventure*, 37.

³⁸Aktieinnbydelse (Subscription of shares), Sandefjord and Kristiania 22. December 1922, A/S Rosshavet archives (Ad-L0011).

James Murray, and finally, Amundsen.³⁹ According to the document, the quotes were from a memo written by Johan Hjort, a former Norwegian Director of Fisheries, professor and a leading scientist on whales and whaling. He was also employed by the Norwegian whaling industry as a consultant and spokesperson, and had initially prepared the memo back in 1914 for the British Interdepartmental Committee on Whaling and the Protection of Whales.⁴⁰

Statements were also included from Kristian Prestrud (the first officer of *Fram*) and Carsten Borchgrevink that both promoted the whaling prospect. In Borchgrevink's words: 'When Captain Larsen has decided to open up a business in this quadrant, as he did at South Georgia, we have reason to expect the best results'.⁴¹

The invitation was successful, and sufficient capital (2.7 Mill NOK) had been secured before the founding, and the first general meeting took place on 12 April 1923. By April, a vessel (DS *Mahronda* of 12,450 dwt, b. 1905) was purchased for conversion to a floating factory and promptly renamed *Sir James Clark Ross*. By May, five catcher boats were also bought second-hand. An extraordinary company meeting was held on 19 July where it was decided to invite a further subscription of stocks.⁴² This was successful, and the company was well-funded to start operations.

On 30 July 1923, the British Order of Council declaring the Ross Dependency was passed. The whalers had been busy preparing the ships and men for the journey south. This formal declaration did not have any consequences on their planning; the whaling licence and most formalities were already in place. The *Sir James Clark Ross* departed from Sandefjord on 22 September 1923.⁴³

Nevertheless, issues about the Order of Council were considered unresolved from a Norwegian diplomatic perspective. The Norwegian Government (the Ministry of Foreign Affairs, the Ministry of Trade and the Minister/Legation in London) was actively involved in discussions in the autumn of 1923, showing that the issue was important for Norwegian commercial interests, and that Norway also had imperial ambitions in this region.⁴⁴ The Norwegian Minister in London, Benjamin Vogt, drafted a note to the British Foreign Office in January 1924. It started by stating that '... it does not at the present moment appear quite clear to my government what the Order implies, my government cannot overlook the fact that the annexation in question may have the effect of jeopardising present or future Norwegian interests or rights'.⁴⁵

³⁹Craig was an officer, and McCormick was the surgeon and scientist with Ross's pioneer expedition. Murray was a biologist with Shackleton's *Nimrod*-expedition (1908–09) that also sailed through the Ross Sea. Racovitza, however, had never been to the Ross Sea. The Romanian biologist and zoologist had been a member of the *Belgica* expedition (1897–99) to the Antarctic Peninsula, but he had apparently compiled a review of whale observations in the Antarctic.

⁴⁰On Johan Hjort's various and extensive involvement with the whaling industry, and in particular with the Interdepartmental Committee on Whaling and the Protection of Whales; see Tønnessen and Johnsen, *History of Modern Whaling*, 345 and s.a., *Den moderne hvalfangst* (vol. III), 264ff., Burnett, *The Sounding of the Whale*, Roberts, *The European Antarctic*, 24ff. and Tjernshaugen, *Hvalfangsteventyret*, 145ff.

⁴¹Author's translation.

⁴²Driftsregnskap og regnskap for første driftsår 1923/24 (Annual report and accounts), Sandefjord, December 1924, A/S Rosshavet archives (Ad-0010).

⁴³Risting, *Kaptein C.A. Larsen*, 115.

⁴⁴Tønnessen and Johnsen, *Den moderne hvalfangst* (vol. III), 271 ff details this discussion, referring to a meeting in the Ministry of Foreign Affairs, on 30 November 1923.

⁴⁵Note from the Norwegian Minister in London to the British Foreign Office, handwritten draft, January 1924, The Archive of Hvalkomiteen (the Whaling Committee) (ARS-A-1174, file "Rosshavet 1924).

A central issue for Norway – not unexpected – was what had happened at the South Pole in 1911. So, the British annexation could not include ‘... the territory circumjacent to the South Pole, which, as will be remembered, was taken possession of in the name of the Norwegian Government by Captain Roald Amundsen (...) nor to comprise the territories on both sides of Captain Amundsen’s route’.⁴⁶

Then there were several other issues more relevant to the whalers. The Government thus approached the Whaling Committee (Hvalkomiteen), its chairman Johan Hjort, and the Norwegian Whaling Association (Hvalfangerforeningen) for their views on the British claim.

One question was whether the ice shelf (called the Ice Barrier) was part of the new Ross Dependency. A second question was how the Ross Sea was going to be considered. It could be argued that only the sea close to the coast was part of the Dependency. If the Ross Sea was omitted, a third question was if there might be undiscovered islands there that could be occupied and claimed by the Norwegian whalers. In summary, the Norwegians raised questions relating to most of the territories included in the British claim, from the South Pole to the surrounding ocean.

However, the Whaling Committee and the Whalers’ Association did not favour any strong protest against the British claim that could hurt Norwegian business interests. It was important to maintain goodwill – as had been the experience at South Georgia and the South Shetlands. The Norwegian Government also shared this view.⁴⁷

A letter from the Norwegian Minister in London to the British Government, eventually sent in February 1925, still emphasised that aspects of the Order of Council did not ‘appear quite clear’, and the Norwegian Government took it for granted that the claim only included known islands and not Amundsen’s claims.⁴⁸

Such issues were not immediately resolved; the Norwegian Government resumed discussing how the Ross Ice Shelf or Ross Barrier should be considered throughout the 1920s. This area was obviously of no interest to the whalers. However, the government brought up the issue in 1927, claiming the ‘Ross Ice Barrier was afloat, and was not therefore included in the Dependency’.⁴⁹ Why the Norwegian Government was still interested in the issue is not apparent. Presumably, it had relevance for Norwegian territorial interests elsewhere in Antarctica that were about to evolve (see later). The British view was clear. The Ross Barrier ‘... was to all extents and purposes a permanent extension of the land proper, and there was a good reason for treating it as *terra firma*’.⁵⁰

⁴⁶Op.cit. Roald Amundsen even wrote a letter to the Minister of Foreign Affairs Christian Michelet, 12. December 1923, to clarify and confirm his annexation, The Archive of Hvalkomiteen (the Whaling Committee) (ARS-A-1174, file “Rosshavet 1924).

⁴⁷Letter from the Whaling Committee to the Ministry of Trade, 1. December 1924 and a letter from the Ministry of Trade to the Ministry of Foreign Affairs, 5. December 1924, The Archive of Hvalkomiteen (the Whaling Committee) (ARS-A-1174, file “Rosshavet 1924). See also Roberts, *The European Antarctic*, 56, who has studied Norwegian Government papers that explicitly deal with the Ross Dependency issue.

⁴⁸Letter from the Norwegian Legation, London to Foreign Minister Austen Chamberlain, 24. February 1924, The Archive of Hvalkomiteen (the Whaling Committee) (ARS-A-1174, file “Rosshavet 1924).

⁴⁹Note from the Norwegian Government, 13 May 1927. Quoted by Auburn, *The Ross Dependency*, 48, who discusses this issue in detail.

⁵⁰British note, 9 December 1927; Auburn, *The Ross Dependency*, 48.

6. The development of Ross Sea whaling

The history of the pioneer whaling operations in the Ross Sea has been chronicled extensively. C.A. Larsen kept a diary during the first whaling season until his death on 7 December 1924, when whaling operations had just started for the second season.⁵¹ Larsen's biography was published in 1929, providing a coherent narrative and factual information.⁵² Alan Villiers, an Australian author, also accompanied *Sir James Clark Ross* on the first voyage south. He wrote a book on his experience, which gives an insightful look into the close-knit Norwegian whaling community from the outside.⁵³

A/S Rosshavet's original plan to establish a base at Campbell Island did not materialise. Instead, the company set up a southern base at Stewart Rakiura Island on the southern tip of Aotearoa New Zealand, where the whale catchers were laid up, maintained and repaired between seasons. A small ship repair yard was built, and some Norwegian workers were stationed there.⁵⁴ The Kaipipi Shipyard was in operation until Rosshavet's whaling in the Ross Sea ended and left a lasting legacy at Stewart Rakiura Island with a historical connection to the Ross Sea and to Norway. In the context of ocean history, it exemplifies how oceans connect rather than divide.

Despite other whaling companies gradually starting operations in the Ross Sea, the leading whaling company was always the pioneer; A/S Rosshavet. Their ship, *Sir James Clark Ross*, visited the Ross Sea for seven whaling seasons from 1923/24 to 1929/30 when she was sold. The company's second floating factory, *C.A. Larsen*, participated there for three seasons from 1926/27 when the ship moved to other grounds. Another pioneer whaling company in the Ross Sea was the Larvik (Norway) based A/S *Polaris*. Its *N.T. Nielsen Alonso*, with a fleet of catchers, operated in the Ross Sea from 1926/27 and the following four seasons. These vessels were accompanied by two more expeditions in the peak season of 1929/30. *Kosmos* belonged to the Norwegian company of the same name (Anders Jahre) and was a new vessel from the shipyard. It was the largest ship to date employed in whaling (indeed, it was, at this time, the largest merchant vessel ever built) and was constructed according to a new design that became a model for all later factory ships. The fifth factory ship was *Southern Princess*, owned by the London-based Southern Whaling and Sealing Company.

The peak whaling season of 1929/30 was an omen of what was to come. A record expansion of the industry coincided with the economic depression. New whaling ships were being built, but the demand for them disappeared – at least for some time. In 1930/31, the Ross Sea was visited by three whaling expeditions: *N. T. Nielsen Alonso*, *Kosmos* and a new *Sir James Clark Ross*, a ship of the same modern design as *Kosmos*. This technological transformation was of little avail to the industry in the short run. The following season, 1931/32, most of the whaling fleet was laid up, and in 1932/33 only one expedition returned to the Ross Sea; *Sir James Clark Ross*. The Antarctic whaling industry resumed in the mid and late-1930s, but elsewhere than in the Ross Sea.

⁵¹C.A. Larsen's diaries are kept with the Vestfold Archive (Sandefjord).

⁵²Risting, *Kaptein C.A. Larsen*.

⁵³Villiers, *Whaling in the Frozen South*.

⁵⁴The working of the shipyard, the Ross Sea whaling, and how this affected the small community at Stewart Island is analysed in Watt, *Stewart Island's Kaipipi Shipyard*.

When A/S Rosshavet started whaling in 1923, the company had been granted an exclusive licence for two years. It was later extended to a third year. Other Norwegian whaling companies felt that this was inappropriate discrimination. One way of demonstrating this dissatisfaction was by challenging the Ross Dependency's geographical extent. We have seen that the whaling community agreed not to challenge the British claim. However, discussions and disagreements followed for several years about how the territorial extent of the dependency should be understood and interpreted. This involved the whaling companies and the areas where a licence was required. It became, very much, an internal conflict between whaling companies and strong and wilful owners. Johan Rasmussen, A/S Rosshavet and companies that had been in the trade in the Falkland Islands Dependencies for a long time defended the concession system. At the other end were people like Anders Jahre and his A/S Kosmos, whose core business plan was to avoid the concessions. The two camps were labelled 'konesjonerte' and 'pelagikerne'; the 'concession whalers' and the 'pelagic whalers'.⁵⁵

The first whaling expedition to follow in the wake of *Sir James Clark Ross*; *N.T. Nielsen Alonso*, had no licence. It operated in the northern parts of the Ross Sea, claiming that this was not part of the Dependency. The expedition also avoided New Zealand territory, using Hobart (Tasmania, Australia) as the base for its fleet of whale catchers for between-season repair and maintenance. *T.N. Nielsen Alonso* operated in this manner for all five consecutive whaling seasons in the Ross Sea. *Kosmos* took the same approach. Its two whaling seasons in the Ross Sea (1929/30 and 1930/31) were unlicensed. At this point, however, the concession or licence system was about to lose its importance. There had been negotiations with the British Government about renewals in 1928, but it was realised that they no longer had any significance.

Even A/S Rosshavet refused to pay from 1929 onwards. Its new *Sir James Clark Ross*, together with *Kosmos*, were both whaling north of the pack ice and not within the proper Ross Sea.⁵⁶

In New Zealand, the whaling companies' operations were considered an evasion of the rules. The licence system did not work as envisaged, and the New Zealand government ended up having almost no income from whaling. A general political opposition to whaling developed that culminated in the passing of the Whale Industry Act in 1935, where remaining whaling licences were cancelled, and further whaling in the Ross Dependency was stopped.⁵⁷

7. From the Ross Sea to Dronning Maud Land

Whaling in the Ross Sea was a significant environmental event and technological development, being crucial for the introduction of pelagic whaling, and paving the way for the vast expansion of the industry in the 1920s. The whaling ships then chose more accessible whaling grounds along the pack ice, especially in East Antarctica (Enderby Land and what was to become Dronning Maud Land). The Ross Sea was never visited by more than

⁵⁵Tønnessen and Johnsen, *Den moderne hvalfangst* (vol. III), 273. See also Tjernshaugen, *Hvalfangsteventyr*, 175ff.

⁵⁶The British Southern Whaling and Sealing Co. was granted a licence for *Southern Princess* from 1929 to 1935, but only operated in the Ross Sea for the 1929/30 season: Watt, *Stewart Island's Kaipipi Shipyard*, 233.

⁵⁷Logan, 'Cold Commitment', 57–68, Watt, *Stewart Island's Kaipipi Shipyard*, 167. See also Esler, *Whaling and Sealing*, 100ff. Esler quotes increasingly critical voices raised in New Zealand against the whaling operations in the Ross Sea.

Table 1. Whaling in the Ross Sea and pelagic Antarctic whaling (1923–1933).

Whaling season	Ross Sea		Pelagic Antarctic	
	Whales	Fl. Factories	Whales	Fl. factories
1923/24	221	1	-	-
1924/25	427	1	-	-
1925/26	531	1	556	1
1926/27	1239	3	786	1
1927/28	2208	3	7350	13
1928/29	2072	3	12584	21
1929/30	4971	5	21011	33
1930/31	5223	3	32242	38
1931/32	-	-	7367	5
1932/33	1388	1	23331	17

Sources: *International Whaling Statistics XVI*, 1942.

five floating factories and their catchers simultaneously in one season (1929/30). In that very season, 33 floating factories participated in pelagic whaling elsewhere in the Antarctic (see Table 1).

The shift of whaling grounds is evident in Figure 2, where whale catches in Antarctic pelagic whaling between 1930 and 1935 are plotted. At this point, there was no whaling inside the Ross Sea, but still some activity outside the pack ice (and licence-area) at about 70°. Most whaling occurred along the pack ice outside the East Antarctica coastline.

In the same way as the Ross Sea whaling and the creation of the Ross Dependency were intimately linked, the further development of Antarctic whaling was also linked to territorial claims. It was also greatly inspired by what happened in the Ross Sea. This is clearly illustrated by the pioneer initiatives of Lars Christensen, associated with his pelagic whaling plans and the *Norvegia*-expeditions of the late 1920s.⁵⁸

To some extent, Christensen's early plans read like a blueprint of C.A. Larsen and A/S Rosshavet's plans. In the introduction to his book, *Such is the Antarctic*, Christensen details the historical background for his plans. He commences with his father, Christian (Chr.) Christensen and his Antarctic whaling initiatives in the 1890s of the *Jason* expeditions, and how they were based on information from James Clark Ross's expedition.⁵⁹ He mentions, in particular, a journal from Alexander Craig that, as we have shown, was also quoted by the A/S Rosshavet founders.

Chr. Christensen had been a pioneer in Antarctic whaling who organised the first whaling expedition with a floating factory ship to the South Shetlands in 1905. Later on, the Christensen family were also involved in whaling elsewhere, but, from the mid-1920s, Lars Christensen's attention was directed towards Antarctic pelagic whaling – preferably beyond British territories where he did not have to pay licences. However, his first initiative was to apply for a licence: In 1926, he went to London and also wrote a letter to the Colonial Office asking for a whaling licence for an area 'outside and along the ice barrier stretching from the entrance to the Ross Sea and to the point where the South Shetland district begins'.⁶⁰ The intention was to operate in the open sea and use islands as

⁵⁸The *Norvegia* and the later *Thorshavn* expeditions, organised and financed by Lars Christensen, resulted in numerous scientific publications, reports and accounts. For broader reviews and contextualisation, Tønnessen and Johnsen, *The History*, 359, Drivenes and Jølle, *Into the Ice*, 178, Orheim, 'How Norway got Dronning Maud Land', 45ff., Roberts, *The European Antarctic*, 53 ff.

⁵⁹Christensen, *Such is the Antarctic*, 22.

⁶⁰Christensen, *Such is the Antarctic*, 27, quoting a letter 9 June 1926 to H.M. Colonial and Dominion Offices, London.



Figure 2. Pelagic whaling in Antarctica, 1930–1935.

Source: *Atlas over Antarktis og Sydishavet*, Hvalfangstens Assuranseforening, Sandefjord undat. The legend (in Norwegian) translates *Catching in February 1930, 1931, 1933, 1934 and 1935*. It includes Blue Whales (red dots), Fin Whales (white dots) and Humpback Whales (triangles). Large dots and triangles indicate 100 whales, while the small ones indicate 10.

bases. He mentioned, in particular, Peter I Island and Dougherty Island. The first one would eventually become Norwegian, thanks to Christensen's expeditions. 'Dougherty Island' turned out to be non-existent.

He wrote further: 'In order to safeguard my eventual operations in that district, I hereby take the liberty to apply for a licence on somewhat similar lines to the licence granted to the Norwegian A/S Ross Sea ...'.

As with Larsen and Konow four years earlier, Christensen's application led to 'a number of negotiations'. Christensen was also told – another parallel development – that the British Government had decided to grant a licence, 'but they considered that New Zealand ought to have a voice in the matter'.⁶¹ This took some time, but in January 1927, Lars Christensen was told that the matter '... had advanced to a point where the Government of New Zealand was willing to draft a general licence'. Permission

⁶¹Christensen, *Such is the Antarctic*, 28, referring to a letter 14 July 1926 from H.M. Colonial and Dominion Offices, London.

to operate around Dougherty Island was specifically mentioned. He was also told that the sector from the Falkland Island Dependency and west to the Ross Dependency was British and should be administered by New Zealand.⁶² In retrospect, this is quite interesting since the island did not exist, and this considerable expansion of the Ross Dependency never occurred. The only territorial claim that was accepted in this region was, in fact, the Norwegian claim for Peter I Island, which was affected by Christensen's second *Norvegia*-expedition (1 February 1929). This did not, however, have much consequence for his whaling operations. The island was, for all practical purposes, inaccessible. Lars Christensen's primary attention had already shifted. From the first *Norvegia*-expedition (1927/28), it had been on the opposite side of the continent. Bouvet Island was visited and claimed for Norway. He believed the 'waters to be very valuable whaling grounds, well worth retaining for Norway'.⁶³ Throughout the 1930s, the continental coastline was explored, leading up to the claim for Dronning Maud Land in 1939. This claim was also, in many ways, interwoven into the broader political struggles for sovereignty in Antarctica that had direct links back to what happened in the Ross Sea area in the previous decade. It was very much about British polar imperial ambitions versus the commercial interests of the (predominantly Norwegian) whalers. New Zealand was utilised to support British policy in the Ross Dependency. Then Australia had the same role when a large sector was claimed in 1933 from the Ross Dependency and westwards. A sector was indeed left for the Norwegians to claim a few years later, although it was smaller than that hoped for by Lars Christensen and his Norwegian explorers.⁶⁴

8. When the whalers left: increased American presence

New Zealand's alignment with British policy and interests in the Ross Dependency continued after the Norwegian whalers had left. However, another active state replaced the Norwegians, the U.S.A. In contrast with Norwegian commercial interests, the USA did not have a particular area of economic interest in Antarctica. However, it strategically retained American 'rights' to have access to Antarctica for exploration and science; acknowledgement as an Antarctic nation in the event of a negotiated territorial settlement or another arrangement, and in deciding any future allocation of access to Antarctic resources.

From the late-1920s, the USA, through private expeditions with government endorsement, had undertaken several expeditions and established a series of bases located near the Bay of Whales, on the Ross Ice Shelf. These 'Little America' bases, five in all from 1929 until 1958, demonstrated an ongoing American engagement with Antarctica. Significant fieldwork had been conducted from the bases from the first flight to the South Pole, piloted by American-Norwegian Bernt Balchen in 1929, to scientific traverses.

This development and consolidation of American engagement with Antarctica, centred on the Ross Dependency, was a matter of concern to the United Kingdom and

⁶²Christensen, *Such is the Antarctic*, 28 and 29, referring to a letter 19 January 1927 from H.M. Colonial and Dominion Offices, London.

⁶³Christensen, *Such is the Antarctic*, 33.

⁶⁴Such aspects are outside the focus of this paper; the reader is referred to an interesting analysis of Norwegian-British tension and negotiations in the 1930s in Logan, 'Cold Commitment', 70ff. For a review of claims in the entire Antarctic region, see Headland, 'Territory and Claims', 160–174.

New Zealand. In 1933, the United Kingdom became increasingly concerned that American aviator Lincoln Ellsworth's planned Trans-Antarctic flight, which was to commence from the Ross Dependency, and Rear Admiral Byrd's 2nd Antarctic expedition (1934–35), would further enhance the United States' Antarctic discoveries and enhance a potential American claim. The United Kingdom became aware of President Roosevelt's public letter to Byrd, wishing him well on his expedition and requesting, 'When you re-establish the Post Office at Little America be sure to send me a letter for my stamp collection'. An American Post Office would be evidence of effective occupation, and there was concern that this would 'derogate' British sovereignty in the Ross Dependency.⁶⁵ On its behalf, New Zealand approved of the United Kingdom raising this matter with the Department of State, who replied with a non-committal response.⁶⁶ The following year, the British Ambassador in Washington reported a communiqué from the United States Post Office Department that, 'The most remote post office ever established under [the] United States flag will be set up on Antarctic ice at little (*sic*) America' with a 'cancellation expert'.⁶⁷ The United Kingdom, without consulting the New Zealand government, raised the matter once more with the Department of State. The American response from Cordell Hull, Secretary of State, was clear and concise,

'H.M.G. New Zealand's claim of sovereignty is based on discovery [J.C. Ross, Scott and Shackleton] – not effective occupation: I cannot admit that sovereignty accrues from mere discovery unaccompanied by occupancy and use'.⁶⁸

The New Zealand government rejected a further objection through the United Kingdom. The Americans indicated that their letters would be postmarked onboard one of Byrd's 2nd Antarctic expedition ships (according to standard shipping custom), and the expedition's wireless station and flight operations were 'approved' by the New Zealand government.⁶⁹

During the 1930s and 40s, American Antarctic policy evolved from the more traditional colonial concept of 'effective occupation' to a more nuanced 'constructive occupation', by which the potential for sovereign control or 'rights' could be established and retained through discovery and ongoing – albeit periodic – activity.⁷⁰ This policy provided the U.S.A. with a cost-effective way of preserving its Antarctica interests while avoiding the high costs of a permanent presence.

In 1946, Rear Admiral Richard E. Byrd commanded the U.S. Navy's Operation Highjump, the largest expedition in Antarctic history with 13 ships, a submarine and over 4,500 personnel. The expedition's missions were the military testing of equipment that could be utilised in the Arctic in the event of a conflict with the Union of Soviet Socialist Republics (U.S.S.R.) and enhancing the basis on which the USA could – if it chose – make an Antarctic territorial claim or enhance its 'rights'. Centred on a base in the vicinity of the 'Little Americas', where Byrd had

⁶⁵Polar Committee. 20 October 1933. 'Minutes of the meeting held at the C.O. [Colonial Office]. on the 29 October ...' Item V.

⁶⁶New Zealand opened its Washington Legation in 1942 (subsequently an Embassy in 1948) with Walter Nash as 'Special Minister'. Source: Ministry of Foreign Affairs and Trade. 1992. *New Zealand Embassy Washington:1942–1992*.

⁶⁷Sir A. Lindsay, 30 October 1934. Telegram from Washington, DC to the Foreign Office. London.

⁶⁸Templeton, *A Wise Adventure*, 63.

⁶⁹Templeton, *A Wise Adventure*, 66.

⁷⁰C.I.A. (1948) *History and Current Status of Claims in Antarctica M-1*, 21.

established his previous bases, the expedition undertook an extensive programme of coastal aerial imagery for mapping, and territorial claims (that could be utilised in the future should the U.S.A. so choose) were deposited by members of the expedition. In the ensuing years, these claims would cause bemusement and consternation to non-Americans. In 1957, members of the U.S.S.R.'s Complex Antarctic Expedition at Mirny Station found one of these symbolic claim statements on a nearby island.⁷¹ In 1961, L. Quartermain discovered a similar American claim statement in a cylinder near Sir Ernest Shackleton's *Nimrod* Hut.⁷² He wrote to A. Savours, of the Scott Polar Research Institute (SPRI), that he was, '... half amused, half annoyed, to find a copper cylinder with a grandiose American territorial "claim" in it. I am afraid that I added a few pertinent remarks ...'.⁷³ The United States of America's interest in the Ross Dependency, with Ross Island, in particular, was no secret; in the *National Geographic* magazine, Byrd wrote that an Operation Highjump party had gone to Ross Island to '... survey the possibilities of establishing an auxiliary base ... [however] the season was so near its end that plans for an auxiliary base were abandoned. The area remains one of the best possible for an expedition headquarters'.⁷⁴

In relationship to Antarctic matters, New Zealand would increasingly find itself caught between its historical, familial and emotional, but strategically diminishing, relationship with the United Kingdom and the U.S.A., the nation upon which its security now depended. In 1948, the U.S.A. attempted to reach an agreement among the Western powers to resolve the dispute over their competing territorial claims between Argentina, Chile, and the United Kingdom, establish a condominium for the continent, and exclude the U.S.S.R. Whilst the United Kingdom and New Zealand supported the principle of this endeavour; it failed, '... notably because of the opposition of Argentina and Chile'.⁷⁵

In the late-1940s, Professor Frank Debenham, founding director of SPRI, was concerned that the U.S.A. had, in the previous 20 years "... sent no less than five expeditions ..." to the Ross Dependency, while no British expedition had been there since 1917.⁷⁶ No New Zealand expedition had ever been to Antarctica. His proposed expedition, based on the Dailey Islands, McMurdo Sound, was to be scientific, albeit that if the United Kingdom, Australia and New Zealand were to be involved, it would '... strengthen the long record of British exploration in that region' and 'Such activity should not in any way conflict with the proposals now under consideration for the establishment of an international regime in the Antarctic, since it is an integral part of these proposals that scientific work should proceed unhindered'.⁷⁷ Debenham was astutely aware of Antarctic science's role in international cooperation or as a benign statement of territoriality. Dr B.B. Roberts, the

⁷¹Swithinbank, *Vodka on Ice*, 34.

⁷²L. Quartermain was a stalwart of the New Zealand Antarctic Society (NZAS) and worked for the Department of Scientific and Industrial Research (DSIR), Antarctic Division.

⁷³L. Quartermain, *Letter to Anne Savours from Cape Royds, 8 January 1961*.

⁷⁴Byrd, "Our Navy Explores Antarctica", 15 and 516.

⁷⁵C.I.A., 'Antarctica'. Weekly Contributions, 8 March 1949. C.I.A. Freedom of Information Electronic Act Reading Room. <https://www.cia.gov/readingroom/docs/CIA-RDP79-01090A000200010009-0.pdf>.

⁷⁶F. Debenham, 'Resume of Proposals for an Expedition to McMurdo Sound, Ross Sea'. 1948, D.O. 35/2888, United Kingdom National Archives (UKNA).

⁷⁷F. Debenham, 'Resume of Proposals for an Expedition to McMurdo Sound, Ross Sea'. 1948, D.O. 35/2888, UKNA.

Foreign Office expert on polar matters, was also concerned that if the U.S.A. were to make an Antarctic Territorial claim, it could, based on American discoveries and activity, extend from the Antarctic Peninsula to Terre Adélie Land.⁷⁸ The British government supported Debenham's proposal in principle.⁷⁹ However, Australia, New Zealand and the United Kingdom were unwilling to provide funding, and the proposal was abandoned.⁸⁰ Geopolitically, New Zealand was aware of the importance of Antarctica on its southern flank, but its worldview focused on Australia and the Pacific islands to the north.

Subsequently, J. Chadwick, of the Commonwealth Relations Office (C.R.O.), noted that Britain was '... anxious that the New Zealand Government should take some further active steps to strengthen their title to the Ross Dependency' and opined that, "The subject is of course a somewhat delicate one in view of Mr. Frasers' [New Zealand Prime Minister, 1940–49] known reluctance to interest himself in the Ross Dependency for fear of offending the United States Government".⁸¹ Chadwick's comments relate to two important matters. The first is that the 1923 British Order in Council that established the Ross Dependency as a British region, administered in New Zealand through the Governor-General (the representative of the Crown), was, by the 1930s, considered to be New Zealand's Antarctic territorial claim. However, it was not until 1983 that the realm of New Zealand legally included the Ross Dependency.⁸² During the 1950s, this disjunction between New Zealand's diplomatic and legal relationship with the Ross Dependency was demonstrated when the New Zealand National Historic Places Trust (NZNHPT) expressed an interest in restoring Scott's and Shackleton's Huts on Ross Island. The Crown Solicitor informed the Trust, that the NZNHPT could not legally do anything in the Ross Dependency as it was not part of New Zealand and that the Trust was explicitly limited to activity within the Realm of New Zealand,

'... it would be entirely unsafe to rely on the provisions of this Act [the empowering act for the NZNHPT]⁸³ for any action which it may be considered desirable to take for the purpose of preserving (or otherwise administering) any places or things of historic or other interest in the Ross Dependency'.⁸⁴

It was suggested that the Governor-General of New Zealand would need to enact '... a separate set of regulations dealing with the matter in detail'.⁸⁵ Concurrently, the U.S.A. had indicated that it would restore the huts. In response, G.R. Laking, of New Zealand's Department of External Affairs, wrote to C. Bowden (the chairperson of the NZNHPT and the Trans-Antarctic Expedition Ross Sea Committee (R.S.C.)) in June 1957 '... urging that New Zealand should take action to maintain the huts before the United States did

⁷⁸United Kingdom. Paper by B.B. Roberts, Foreign Office Research Department: 6 March 1947. Quoted in Templeton, 91–93. PM208/12/1 part 1b. Archives New Zealand Te Rua Mahara o te Kāwanatanga.

⁷⁹United Kingdom. Letter from Noel-Baker P.J., Commonwealth Relations Office to the Minister of External Affairs, New Zealand. 5 January 1949. ADM 1/21107, UKNA.

⁸⁰Lintott, 'Commemorating the Ross Sea Party', 164.

⁸¹United Kingdom. Letter from J. Chadwick, Commonwealth Relations Office to A.W. Snelling, New Zealand Department of External Affairs: 12 July 1949. ADM 1/21107, UKNA.

⁸²Templeton, *A Wise Adventure*, 11.

⁸³New Zealand. 1954. *National Historic Places Act 1954*.

⁸⁴E.J. Haughey, Crown Solicitor. (1957). *The Historic Places Act 1954 - Application Ross Dependency (Your Reference I.A. 60/70/71)*. Letter to the NZNHPT: 7 May 1957. Heritage New Zealand Te Pouhere, Antarctic Huts 12,002–001. Vol. 1.

⁸⁵Ibid.

so'.⁸⁶ Undeterred by a legal opinion that proscribed their geographical activities, the NZNHPT responded by establishing a sub-committee to report on '... the huts preservation' and supported the work on the huts.⁸⁷ The British observation that Prime Minister Fraser's '... fear of offending ...' the United States in Antarctic matters was astute; Antarctica was not a matter New Zealand considered worthy of aggravating its relationship with the U.S.A.⁸⁸

The International Geophysical Year (I.G.Y., 1957–58) utilised global observations and technology to investigate the Earth as a system, focusing strongly on Antarctica. The United States of America's I.G.Y. scientific plan had a major Antarctic component, centred on the Ross Dependency and the adjacent unclaimed sector of Antarctica. The initial American I.G.Y. plan was centred on a new 'Little America' with a base in the unclaimed sector and one at the South Pole. Initial plans for a primary runway, on the Ross Ice Shelf, at Little America were abandoned due to concerns of an ice breakout – with the runway floating away. The decision was made to establish an Air Operations Facility on Ross Island, avoiding the term 'base' or 'station' to ameliorate New Zealand's concerns about an expanding American presence. In 1955, the U.S.A. endeavoured to get New Zealand to establish an I.G.Y. base on Ross Island, and the U.S. Navy offered to transport their 'kitset' base to Antarctica', an offer that was politely declined.⁸⁹ However, New Zealand did establish Scott Base on Ross Island in 1957, to support the Commonwealth Trans-Antarctic Expedition, assert its territorial claim through physical presence, and participate in the IGY. Reflecting upon New Zealand's Antarctic endeavours prior to the Antarctic Treaty, New Zealand advocate L. Quartermain stated that New Zealand had, '... beyond question, added the necessary validation of her claim to sovereignty over the Ross Dependency provided by regular occupation and effective administration'.⁹⁰ Despite these expressions of territoriality, New Zealand Antarctic policy, in the 1950s, was informed by an idealistic interest in what could be achieved through international cooperation; be it through an Antarctic condominium, the United Nations or some other internationalist mechanism.

During the 1950s, the U.S.A. reviewed its Antarctica policy. NSC 5424/1, *Antarctica*, stated that Antarctica, '... has little or no present economic value...'⁹¹ In early-1956, American Antarctic policy was discussed at the National Security Council. President Eisenhower, considering economic worth, 'suggested that even if mineral deposits were actually found in Antarctica, the cost of their extraction would make their value highly problematical'.⁹² He then enquired if the 1957 Antarctic budget was the minimum necessary to support America's I.G.Y. research and was answered in the affirmative.

⁸⁶Anon. (1957). *Extract from minutes of National Historic Places Trust meeting on 3 July 1957*. Heritage New Zealand Te Pouhere, Antarctic Huts 12,002–001. Vol. 1.

⁸⁷*Ibid.*

⁸⁸Templeton, *A Wise Adventure*, 87 and 88.

⁸⁹National Security Council, Operations Coordination Board. 1955. Establishment of Stations at Antarctica 'Gap Locations' for I.G.Y. 1957–58. 14 January 1955. 'White House Office, National Security Council Staff: Papers, 1948–61. O.C.B. Central File Series. Box 61, A82–18. Dwight D Eisenhower Presidential Library.

⁹⁰Quartermain, *New Zealand and the Antarctic*, 41.

⁹¹United States of America. 1954. NSC 5424/1 *Antarctica*. <https://history.state.gov/historicaldocuments/frus1952-54v01p2/d305>.

⁹²United States of America. National Security Council, 'Memorandum of Discussion at the 272nd Meeting of the National Security Council'. <https://history.state.gov/historicaldocuments/frus1955-57v11/d313>.

He stated that ‘... before he bought a horse he wanted to know what he was going to do with him besides feed him ...’. and,

‘He concluded with a reiteration of what he conceived our policy toward Antarctica should be. It was perfectly clear to him that we should first continue to reserve our rights in the area; second, achieve what the scientist wishes to achieve in connection with the International Geophysical Year program; and third, ask the Secretary of State to initiate exploratory conversations with other interested free world countries regarding the possibility of creating a condominium in the area.’⁹³

Were it not for the presence of the Soviets in Antarctica, the U.S.A. had hoped to conclude its I.G.Y. research and largely depart from Antarctica; possibly retaining some small bases for science, with periodic scientific expeditions, to affirm what it perceived as its potential ‘rights’.

During the I.G.Y., the U.S.S.R.’s Complex Antarctic Expedition had established a significant and respected Antarctic presence and scientific programme, and it became clear that the Soviets intended to remain in Antarctica. In 1958, the U.S.A. concluded it would remain in Antarctica if the Soviets did not leave and reviewed its Antarctic policy. Concluding that the main benefit to be gained in Antarctica was scientific knowledge, it also identified the need to, ‘Establish uniform and non-preferential rules applicable to all countries and their nationals for any possible development of economic resources in the future’.⁹⁴ The United States of America subsequently proposed and promoted a conference in Washington DC that would result in the Antarctic Treaty (1959), establishing a governance system based on peace and science.

In this period, when the international focus in Antarctica had shifted away from commercial activities, a second brief whaling era occurred when the U.S.S.R.’s whaling fleets were in the Ross Sea in the late-1950s and early-1960s. Soviet scientists warned about the excessively high catch rates (25,000 whales in two years), and whaling in the Ross Sea quickly became economically unviable.⁹⁵ Whilst the Soviet whaling fleet in the Ross Sea was of concern to New Zealand, the fleet’s presence was swift and transitory. Concurrently, the Antarctic nations had agreed on the Antarctic Treaty.

The Ross Sea region remains a hub for polar science. The United States of America has the longest cumulative and continuous presence in the area, and the most extensive and expansive scientific programme in Antarctic history. Through its logistical infrastructure at McMurdo Station on Ross Island and Amundsen-Scott South Pole Station, and ongoing scientific research, it is the most significant economic actor in the Ross Sea region.

9. Conclusions

The paper has explored the political and economic history of the Ross Sea region, focussing on the circumstances that led to the establishment of the Ross Dependency in 1923 and how it later developed and was managed unenthusiastically by New

⁹³United States of America. National Security Council, ‘Memorandum of Discussion at the 272nd Meeting of the National Security Council’. Accessed: 13 May 2022: <https://history.state.gov/historicaldocuments/frus1955-57v11/d313>.

⁹⁴United States of America. 1958. *Statement of U.S. Policy on Antarctica*, NSC 5804/1. ‘Objectives’ §14.D

⁹⁵Gan, ‘The first practical Soviet steps’, 21–28, Berzin, ‘The Truth About Soviet Whaling’, 12. See also Tønnessen and Johnsen, *The History*, 583ff. and Ellis, *Men and Whales*, 412ff.

Zealand – with Britain’s imperial ambitions always hovering in the background. Interwoven in the complex discussions of sovereignty and the extent of economic activities, is the definition of the Ross Sea, related to its unique feature of open water and an enormous ice shelf.

We have aimed to explore different perspectives on how the political and economic development of the region should be understood. One is the importance of the whaling industry in relationship to the territorial claim in 1923. The second is that the development of the new pelagic whaling technology transformed the economics of whaling, related diplomatic relationships and the ecology of the Southern Ocean.

Another, related and more general, issue concerns the tensions caused by the presence of a third party in the region; in this instance, Norway, the United States of America and for a brief period the U.S.S.R. In the 1920s, Norwegian whalers were contesting the territorial claims, and then the brief presence of the U.S.S.R.’s Slava whaling fleet that ignored New Zealand’s views on whaling. American geopolitical and economic ambitions in the region were of concern to the United Kingdom and New Zealand. Such tensions abated after the establishment of the Antarctic Treaty in 1959. This paper has not explored the period after the Treaty was signed. In accordance with the Treaty, New Zealand’s Antarctic territorial claim is in abeyance, under Article IV. Geopolitically, the presence of the U.S.A. in the Ross Dependency, through a peace treaty, enhances security for New Zealand’s southern flank. Its economic interest in Antarctica had gone from issuing whaling licences, with shore-based repairs and provisioning, to the significant financial benefits of having Operation Deep Freeze with the United States Antarctic Program (USAP) utilising New Zealand as an Antarctic Gateway. In addition to the direct economic benefits of providing supplies, including fuel for ships and aircraft, and other services to the USAP, the local tourism industry has benefitted from the large number of USAP and supporting military personnel who go on vacation while enroute through New Zealand to Antarctica.

The economic and political situation in the Ross Dependency, indeed in the entire Antarctic region, is very different today from the era analysed in this paper. The establishment of The Commission for the Conservation of Antarctic Marine Living Resources (CCMLAR) in 1982 has provided a forum for managing Antarctic marine resources. However, it is worth noting that current negotiations (as of 2023), regarding how much of the Ross Sea should be set aside for scientific research and how much should be made available for managed fishing, occur within a historical continuum. This paper’s historical examples and analysis of economic and diplomatic choices and dynamics provide material that can inform future Antarctic scholarship and provide context for current developments.

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