

Education for Migration: schooling, development policy and the Filipino aspiration to emigrate

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***Education for Migration: schooling,
development policy and the
Filipino aspiration to emigrate***



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Chapter 1

Introduction/Synopsis: Education and the Filipino culture of migration

1.0 Background/Rationale

In 2008, Filipino writer, TV host and pop culture iconoclast Jessica Zafra wrote¹ ,

In 1994 I wrote “ A simple proposal for world domination,” in which I revealed the Filipinos’ plan to take over the planet by exporting millions of domestic helpers. These domestic helpers - maids and nannies - were already embedded in the homes of foreign politicians, business leaders, media moguls, and entertainment personalities. They had made themselves indispensable to their employers, who were busy with the affairs of state and industry, by keeping their households in order and looking after their children. You could say that these maids enabled world leaders to do their jobs freeing them from their domestic chores.

I then suggested that maids were our secret advance army, moles awaiting activation. At a given signal, they all go on strike, causing chaos across the globe. Governments and corporation would cease to function as everyone dashes home to attend to their own children, do their own laundry, and clean their own toilets. Then we present our demands, including cancellation of our foreign debt, easier market access for local products, and visa-less travel. Unless our demands are met, Filipino maids will continue their work stoppage, calmly eating green mangoes with bagoong while their charges scam and squall in their dirty diapers. We would have the world at our mercy.

Though this passage appeared in a satirical article in a major daily newspaper, Zafra was amused by the attention it elicited, including from some readers who thought she was serious. It was not surprising that labour migration imaginings (realistic or fantastical) would permeate even popular culture platforms (like the 2008 ‘reader’ in which the above piece was reproduced) at that time. During the Ramos Presidency (1992-98), Filipino labour migration had reached new heights, and migrant workers were hailed as “modern-day heroes” for the contribution of their remittances to the domestic economy. By the early 2000s, OFWs were routinely portrayed as “superhumans”- in the mold of superheroes² (‘supermaids’ and ‘supernannies’) and even as the country’s ambassadors.³

Labour migration has happened to varying extents in many different societies at different times. But Filipinos have elevated this practice to a different level altogether. In the past half century, a pervasive migration subculture has come to dominate many spheres of Filipino society. So it behooves one to ask: What is distinctive about Filipinos’ propensity to migrate? How can this distinctiveness be explained? *And how has education contributed to and reflected this process?*

¹In 2008, Jessica Zafra edited *Flip*, a Filipino popular culture ‘reader’ with contributions from Filipino industrialists, public thinkers, academics, journalists and other media personalities. A chapter was devoted to Filipino migrant workers and diaspora population and the quotation is her proposition on how Filipinos should take over the world (World Domination Theory).

² Part of Gloria Macapagal Arroyo (2000-2010) government’s infamous marketing campaign to expand to other foreign labour markets the export of Filipino domestic helpers.

³ A Philippine migration scholar actually published a book on the prospects of OFWs as the country’s diplomats. The 2012 book *Diaspora Diplomacy : Philippine Migration and Its Soft Power Influences* argues that international migrants constitute the soft power of the Philippines and they are a resource that governments, NGOs, the corporate world, and international organizations can tap to enhance global cooperation and development. The book advances the concept of “diaspora diplomacy” as the “collective action” that is “driven, directed, and sustained by the energy and charisma of a broad range of migrants” who “influence another country’s culture, politics, and economics” in a manner that is “mutually beneficial for the old homeland and the new home base (cf. Gonzales 2012).

Whilst there is a considerable body of research analyzing Filipino labour migration from various perspectives,⁴ very few examine the role that education plays in fostering both skills that are ‘marketable’ overseas, and the desire (or willingness) to migrate in the first place. The scant literature available is mostly limited to analyzing how reforms to higher education have reflected and contributed to the phenomenon of labour export and emigration in general.⁵ Tending to focus on particular occupations such as nursing, seafaring, domestic service or ‘entertainers’ (e.g. *Japayukis* in Japan), most previous research on the relationship between education and labour migration treats education simply as an instrument for skills formation, neglecting its role in political socialization – or, in the specific case of the Philippines, its contribution towards creating a predisposition to migrate. Among the purposes of this study, therefore, is the analysis of historical evidence relating to the role of school curricula in socializing Filipinos towards emigration. At the same time as analyzing this aspect of education’s role in political socialization, I also attempt to illuminate the political implications of educational structures and systems that facilitate migration (e.g. those involving the certification of migrants’ qualifications).

Standard analyses of nation-state formation and modernization in Asian societies have overwhelmingly stressed the developmental role of education. The major contributions assigned to education typically include: fostering social cohesion and national identity; providing workers with the skills required by the national economy; and providing an (ostensibly) equitable and meritocratic basis for social mobility (Fagerlind and Saha 1989; Morris 1996; Green et al. 2007). As this thesis will demonstrate, the Philippines does not conform to this orthodox account. It had achieved high levels of educational access and literacy many decades before its neighbors, but had failed to either sustain its economic development or to promote a strong, cohesive consciousness of national identity. The role of education has instead mutated to help commoditize much of the workforce for the global migrant labour market.

The inception of this study can be traced to my MA research project, a comparative study of the Philippines and the so-called ‘East Asian tigers’: Hong Kong, Singapore, South Korea and Taiwan. I contrasted the role of education in the post-war development of these ‘miracle’ economies with the case of the Philippines, which until the 1970s was the second largest economy in Asia (after Japan). That research showed that the Philippine state – in contrast to its more ‘developmental’ neighbours – evinced relatively weak central control over the national education system. This was largely attributable to the influence of non-state actors (notably the Catholic Church) and the continuing neo-colonial relationship with the United States. The resulting absence of meaningful social reform, along with economic stagnation, elite rent seeking and social fracture, has created a vicious circle – impoverishing democracy and undermining state

⁴ See publications of Parrenas (2001, 2008) and Tyner (2004) on the feminization of labour migration, Rodriguez (2010) and Guevarra (2010) on the emergence of Filipino labour-brokerage state as examples.

⁵ The most recent studies on higher education-labour export nexus are by Ortiga (2017) and Ruiz (2014). Although the OFW phenomenon has been widely covered in various themes of migration studies in the last five decades, the analysis on the role of education is still limited on skills formation for work placement abroad.

capacity (Anderson 1988; Bello 2009). Persistent ‘underdevelopment’ meanwhile helped create conditions conducive to the rapid growth of labour migration. The relationship between education and the phenomenon of migration was an issue that emerged from my MA work, some of the main findings of which are discussed in Chapter 2 of the present thesis.

Aside from academic motivation, my own family background also influenced my interest in this issue. My mother left the country in 1987 to work as a nurse in Riyadh, Saudi Arabia. She retired and returned home only in 2017, having spent almost 30 years as an Overseas Filipino Worker (OFW). In 2012, my sister and brother-in-law, both nurses, left for Australia with the intention to emigrate permanently. They expect to be awarded Australian citizenship later this year (2019). Their son, my 2-year old nephew, is the first member of our family to be born as a foreign citizen. I grew up showered with gifts from OFW uncles and aunties based in Saudi Arabia, Singapore and the US. Many of my cousins currently work on cruise ships, oil tankers and cargo vessels as contract seafarers. Other cousins have permanently emigrated to the US and Australia as health care professionals (two are nurses, a dentist and a physical therapist).

Growing up on a small island, the idea of travelling and ‘working abroad’ presented an exciting prospect for my cousins, siblings and me. This prospect helped drive us to study well, earn good grades and train for a profession that would help us achieve our dream of leaving the country. In high school, I remember writing a lengthy English composition on how I visualized myself a decade after graduation. It read like a page ripped from a screenplay of a Hollywood film, and involved braving a snowstorm on my way from work to my home in the New York suburbs. I had imagined myself as a practicing chemical engineer in the US. I was 15 years old, had never travelled abroad and only saw ‘America’ from pirated ‘Betamax’ movies shown in the neighborhood ‘movie house.’ But I also remember reading excitedly about the US in the overpriced multi-volume encyclopedia our father bought from an itinerant salesman.

The idea that one should leave the country in search of prosperity seemed ‘normal’ for me. Schooling reinforced this notion, not necessarily through explicit promotion, but through extensive, matter-of-fact description. Teachers tended to be neutral or encouraging towards the idea of emigration during class discussions. The extent to which my personal experience was (or is) representative of homes, schools and communities across the country is addressed only indirectly or tangentially in this research.⁶ But my own early exposure to the cycle of overseas labour migration, and to positive portrayals of the world beyond the Philippines (primarily America), left a lasting impression, and was crucial in shaping the concerns that inform this study.

⁶ Ideally, a quasi-ethnographic study of home-school environment could provide empirical evidence for such assumptions. A discourse analysis of labour migration-related ‘conversations’ and general views towards emigration would be appropriate. Doronila’s (1989) study employed class observations, highlighting the role of teachers in transmitting official knowledge. She highlighted favorable views of teachers towards the role of American consultants in the Marcos government, which in turn were deemed symptomatic of ‘neocolonial consciousness’ of the teachers.

My interest in the topic was further sustained by many encounters with Filipino contract workers and emigrants as I moved around universities in Europe for my Erasmus Mundus⁷ mobility program. I even got my first 'overseas work' – a cleaning job – through a Filipina I met on a bus on my first year of study in Copenhagen. She arrived in Denmark in the 1990s as an *au pair* and moved through various jobs. At the time of our bus encounter, she had just started her own cleaning company and I was one of her first recruits. What I earned from my cleaning jobs under her watch paid for my travels around Europe where I met other Filipino migrants, like the hostel caretaker in Greece, the bed-and-breakfast owner in Rome, and Filipino crew members of cruise ships docked in Venice. Most of the land-based Filipino migrant workers I met on these travels were household workers (especially in Italy) - and the majority had university degrees or at least some years of tertiary education.

In retrospect, I would assess my encounters with them as not just cordial but 'open and familiar.' Not all interactions were the same, but more often than not the moment they realized I was a *kababayan* (literally means a town-mate but loosely used as a collective term for the Tagalog equivalent of fellowmen or the gender-neutral fellow citizen) they warmed to me almost instantaneously. If the initial contacts were brief, the next would probably be over delicious home-cooked Filipino food in their homes. By the end of the home visits, they would have already shared their family history, love stories, dreams and frustrations. Sometimes, all this could become somewhat overwhelming. But this pattern of relating to fellow Filipinos in foreign lands has been the subject of many ethnographic and anthropological studies (cf. Ong 2011). Essentially, fresh encounters with newly arrived *kababayans* served to remind a migrant worker or emigrant citizen of 'home' (which could also be *bayan* or town) or more intimately of the family he or she left behind in the Philippines.

Many ethnographic studies have shown how collective sentiment (or affinity) amongst overseas Filipinos is manifested in their love and devotion to the family unit or its equivalent (as with housemates). Strong identification with a common town or region (defined by common ethnolinguistic markers) is manifested in fundraising drives for victims of calamities back home. My own experience validates claims concerning the dominance of family-centered, regionalistic and religion-based values, over and against any loyalty to the Philippine state or commitment to the development or transformation of Filipino society. This overriding devotion to the welfare of the family, combined with a lack of faith in (and perhaps relatively weak identification with) the nation-state has driven many Filipinos to seek opportunities abroad.

This has led some observers to indict educated Filipinos for their apathy towards societal conditions back home. For example, the Philippine scholar Vicente Rafael (1997:206) depicts '*balikbayans*' from North America as having

⁷ Erasmus Mundus (now Erasmus +) is an academic mobility program funded by the European Union providing opportunities for students, academics, university staff and officials from non-EU countries to study, train or do research in European universities. I attended the European Master of Arts in Lifelong Learning Policy and Management (2007 to 2009) under the consortium of University College London-Institute of Education, Aarhus University-Danish School of Education and University of Deusto. The program allowed me to live and work with fellow Filipinos in Copenhagen, Bilbao and London.

attitudes similar to those I have encountered across Europe:

The term joins the Tagalog words *balik* [to return] and *bayan* [town, and at least from the late nineteenth century on, nation]. As a *balikbayan*, one's relationship to the Philippines is construed in terms of one's sentimental attachments to one's hometown and extended family rather than one's loyalty to the nation-state. At the same time, being a *balikbayan* depends on one's permanent residence abroad. It means that one lives somewhere else and that one's appearance in the Philippines is temporary and intermittent, as if one were a tourist.'

This thesis analyzes the role of schooling in germinating the desire to emigrate, and of related systems and structures (e.g. for certifying migrant qualifications) in facilitating labour migration. While the migration phenomenon has been extensively researched by scholars in other social science fields – as highlighted below – analysis of its relationship with education has so far been slight and superficial. Indeed, this is more broadly true in mainstream analyses of Filipino development. The overarching question that informs the present study is therefore: to what extent does the history of schooling, training and certification systems in the modern Philippines help explain the particular propensity of Filipinos to migrate for work? My attempt to answer this question takes the form of a number of separate but related historical case studies, investigating different aspects of the schooling-certification-migration nexus. This approach is related to the nonconventional provenance of this PhD thesis. It was not developed the traditional way, progressing from chapter to chapter, but is rather built around existing publications – journal articles and book chapters consisting of three initial studies produced during the period 2012-2015, supplemented by three additional papers published from 2015 to 2018. (See Annex 1 for a summary of each book chapter / paper).

2.0 Scope and Methodology

When I started investigating the role of education in the 'culture of migration' in Filipino society, I did not imagine this would mean searching for historical materials spanning a century. This study synthesizes literature dealing with more than a century of the country's economic and educational history, drawing on previously unused or under-appreciated archival documents on Philippine education. It traces the genesis of the practice of 'education for migration' from colonial times to contemporary Philippines, combining analysis of curriculum development with discussion of relevant institutions and structures, and the politics that has shaped their evolution.

Institutional and historical approaches in comparative education research

In earlier work for my MA dissertation, I compared the case of the Philippines as an 'anti-developmental state' with those of the East Asian tigers (Hong Kong, Singapore, South Korea and Taiwan), focusing on the role of education in their post-war developmental trajectories (see Chapter 2). The main methodological frame of this initial study was the macro-causal approach applied to the history

of the countries under analysis. One variation of this approach deployed by Skocpol and others uses comparative history to draw causal inferences about macro-level structures and processes (Skocpol and Somers 1980:181) and state-society interrelations (Skocpol 1985). I used this method to examine the dynamics of the political-economic structures of a neoclassical system or “democratic state” (i.e. the Philippines) and “developmental states” (East Asian tigers) by investigating their trajectories of development from the post-war years to the present. The attempt to explain the rapid development of the East Asian countries and underdevelopment in the case of the Philippines was further guided by Myrdal’s institutional approach to development studies, wherein ‘history and politics, theories and ideologies, economic structures and levels, social stratification, agriculture and industry, population developments, health and education and so on must be studied not in isolation but in their mutual relationships.’ (1968 vol. 1: x).’ I concluded that education was central to explaining the variation in the performance of these economies. In section 3 of the present chapter, I adopt a similar comparative approach to analyze what makes the Philippine labour export program unique in comparison to the experiences of other major labour exporting countries such as India, Mexico, Indonesia, Bangladesh and Nepal.

My earlier study of educational development in the postwar Philippines was informed by insights drawn from institutional theory as espoused by North (1990 2003 2009) in the field of development economics, and by Cummings (1999) who adapted the institutional approach to study educational issues. Institutions are defined as phenomena that structure, bind and stabilize human interrelations (cf. North 1990 2003) and in economics, for example, they form the basis of the “incentive system governing trade and investment negotiations. Institutions have formal rules, informal constraints and enforcement mechanisms (ibid). Further, North (1990) posits the crucial role of institutions in economic interplay at different levels, by various actors and in multiple contexts, akin to the “rules of the game.”

These institutions are further defined by Cummings (1999) as “complex norms and procedures oriented toward realizing a particular goal or ideal, and they motivate behaviour towards these goals or ideals” (ibid.:413). He finds these norms and procedures instructive in studying the process of attaining the “ideal goals of a state education system, which are almost invariably defined by the ruling political regime” (Morris and Sweeting 1995 1998; Morris 1996 2009; Lall and Vickers 2009). Here I analyse the policies and priorities of various regimes, and dominant conceptions of the purpose and function of education in the economic and political life of the Filipino nation. This is instructive in investigating critical elements of the education system manipulated by different regimes in the construction of a model Filipino citizen. In particular, I argue that the portrayal (and promotion) of Filipino overseas workers as modern-day national heroes at the peak of the Filipino labour export enterprise tells us some interesting things about the politics of national identity in the Philippines, and the role of schooling in political socialization.

The developmentalist thinking that informed my earlier research on

education's role in making the Philippines an 'anti-developmental state' overlaps with the historical functionalism espoused by pioneer comparativists Isaac Kandel and Nicholas Hans (1930s to 1950s) respectively. The most fundamental (if rather banal) tenet of this approach is that education cannot be understood in isolation from other social and political institutions, but must be examined in its social context. In this and subsequent chapters I therefore seek to highlight the 'political relations of schooling' following the the Kandelian concept of the 'state.' Kandel saw the nature of the state itself as a determining factor in categorising, understanding and evaluating national systems of education (Kazamias 2009). Throughout this thesis, the state's role in shaping – or neglecting to shape (in any coherent sense) – the nature (and purpose) of schooling across different periods is a recurrent theme. In this respect, the policies of the Marcos regime, whose technocrats aggressively pursued labour export as major development policy, has received considerable attention in previous literature - often to the neglect of earlier and later periods. Marcos proclaimed that he was reforming schools to make the Philippines 'great again' (Marcos 1965)⁸. Under his 'New Society' plan, schools were viewed as critical tools for attaining economic prosperity and molding patriotic citizens.

Archival research

Archival research was undertaken in investigating the historical and policy contexts of Filipino labour migration. Relevant documents, such as the Acts of US Congress, the Philippine Commission (convened in 1900) and Philippine Assembly (elected in 1907) and Commonwealth government (established 1935) amongst others were analyzed. But my archival research has been limited to materials left behind by the Americans (many more materials are in the possession of US universities and archives) and housed at the American Historical Collection of Ateneo de Manila⁹'s Rizal Library and University of the Philippines Library. Colonial-era materials uploaded in the online archive HathiTrust Digital Library (www.hathitrust.org), including various curricula, reports of the Department of Public Instruction and even digitized copies of some American era textbooks and school manuals. Archival materials at the Department of Education Central Office Library, particularly policy issuances, planning documents, speeches and publications of previous Ministers / Secretaries of Education were also utilized.

Aside from the archives, textbooks were another primary source for this study. In the process of putting together this thesis, a purposive sampling and selection of textbooks along this periodization was employed: 1901-1935 (early American), 1936-1946 (Commonwealth), 1942-45 (Japanese occupation), 1946-72 (post-independence, pre-martial law), 1972-1986 (martial law), 1986 onwards (post Marcos). The analysis focused on: a) how history and civics

⁸ Marcos laid the foundation of his New Society project way back in the beginning of his presidency in 1965. In his first inaugural speech as President (30 December 1965) audaciously titled "Mandate for Greatness" he intoned, "This nation can be great again. This I have said over and over. It is my articles of faith, and Divine Providence has willed that you and I can now translate this faith into deeds."

⁹ Ideally, additional archival work should have been carried in the US especially in the National Archives Records Administration (NARA) in Washington DC and the University of Michigan Bentley Historical Library where Philippine colonial records are deposited.

education were used (or not) to foster a Filipino national identity; b) when and how topics on emigration (especially to the US) first emerged and were portrayed in textbooks under the Americans; and c) and how labour export and the idea of 'working abroad' since the 1970s were presented and discussed in Marcos-era textbooks and beyond. Marcos-era textbooks received further scrutiny as to how they were used as propaganda tools by the Marcoses for their personal aggrandizement.

Textbook analysis and interpretation

This thesis is also a significant contribution to the study of Filipino education through textbook analysis. Whilst textbooks are a staple source of evidence or themselves the subjects of historical research in other countries, this has not been the case in the Philippines. Only a handful of studies (cf. Doronila 1989 1992; Mulder 1990 1994 1997 1998 2000; Diokno 2009; Iletto 2017; Curaming 2017) have been produced in the last five decades using school textbooks as primary materials in investigating issues such as national consciousness, nationalism, national identity and historical revisionism among others.

This study takes a novel approach in investigating the 'positive portrayal' of labour migration in official textbooks from the colonial era up to the 1970s, when Marcos formally promulgated the labour export policy. Through the chapters, readers will discover how the concepts of labour migration and permanent emigration have been codified in school texts (cf. Doronila 1989 1992), thus reflecting just how deeply ingrained they have become in Filipino society. .

It has been pointed out that school textbooks, which first emerged roughly in the 1830s (when the word itself appeared), are among the most useful sources for social researchers and historians (Stray 1994:2 in McCulloch 2004). Textbooks are highly significant not only for the way in which they present prescribed information but also for their projection of approved values and ideologies. Foster (1999) further argues that they are socially constructed artefacts that 'offer a window into the dominant values and beliefs of established groups in any given period', and act as 'gatekeepers of ideas, values and knowledge' (253). Apple and Christian-Smith (1991) insist that textbooks' representation of what counts as 'official knowledge' really signify deeper political, economic and cultural relations, both in the past and in the present. In the context of the Philippines, debates on 'knowledge production' are still limited and have yet to be teased out from education policies and available historical materials. There is a need to discuss what constitutes official knowledge in the Philippines, who has shaped it, to what purpose and to whose benefit. All this falls beyond the remit of this thesis, but is worth highlighting in view of the themes tackled here.

For illustrative purposes, one example relevant to this study is the enduring debates on the continued justification of the neocolonial relationship between the US and the Philippines in the official textbooks of the 1980s. As mentioned earlier, the critical studies of Doronila (1989) and Constantino

(1982), outdated as they may now be, remain essential texts for the study of Filipino curricular politics. These scholars identify the US (and affiliate international organizations like the World Bank) as highly influential in the production of the controversial textbooks. There have been a few attempts to replicate these studies (cf. Segovia 1997; Diokno 2009), the most recent being the study of Filipino history textbooks published from 1905 to 2000 by Brunei-based history scholar Rommel Curaming (2017). His major finding is that across time and themes, the patterns of nationalist discourses are generally incoherent. This may indicate that the control over official history knowledge production has become less than hegemonic. He concludes that textbooks embody a plurality of competing social forces and reflect the political dynamics of an era (Curaming 2017) validating earlier assertions of Doronila and Constantino but also offering a possible alternative view on the degree of Marcos regime's control over the education system- as reflected in the textbooks produced during this period.

Nonetheless, portrayals of the dissemination of social and cultural values through textbooks have supported a number of interesting and important findings of studies conducted elsewhere. For example, John Ahier has discussed how discourse on national identity has formed a subtext of geography and history textbooks in Britain, including their images of the city and the countryside (Ahier 1988). Stuart Foster has investigated the treatment of ethnic groups in history textbooks in the United States in terms of a struggle for American identity. According to Foster, to understand how textbook writers in different periods of American history have responded to issues about national identity and heterogeneity is also to appreciate the dominant values and ideology of the age. It also offers 'an opportunity to appreciate how certain societal forces have validated the historical contributions of identified groups over the claims of others' (Foster 1999:251-2).

One chapter of this thesis (Chapter 6) is the product of my participation in an international research network (2010-2013) which examined how 'Japan' is constructed in educational materials, particularly textbooks, and popular media in East and Southeast Asian societies. One of the key findings which emerged from this comparative study (Morris, Shimazu and Vickers 2013) concerned the extent to which the Philippines deviated from other countries in the region in the ways it constructed national identity, particularly in terms of how foreign 'others' were portrayed in that process. The textbook analysis that forms the basis of Chapter 6 sheds light on the role which the country's three colonizers have played in the process of constructing a Filipino national identity. Whilst they tend to be portrayed in textbooks as either benign (USA and Spain) or brutal (Japan) colonizers, there is a strong emphasis on their 'positive' contributions to the country, specifically in the education of Filipinos.

Meanwhile, Clive Harber (1997) also reminds us that school textbooks are especially important in developing countries, where they are often central to the teaching and learning process. The sociopolitical values that they represent are often highly explicit. Omissions from the textbook can be just as interesting as the kinds of emphasis that it observes, while the kind of language used and the

role of pictures and captions are also significant (Harber 1997:121–2). This is especially true in the case of the Philippines in the last two decades wherein the depoliticized treatment of the country's colonial history is not just the main issue (cf. Diokno 2009). This issue is now eclipsed by scandals on the proliferation of highly-defective and error-riddled textbooks (cf. Go 2005; McIndoe 2009) and the public outcry on the inadequacy of textbooks in discussing martial law and the Marcos years (Mateo 2016). However, McCulloch (2004) cautions readers not to exaggerate or assume too much about the power of textbooks to influence pupils and the general public. Apple and Christian-Smith, for all their concern about the political reverberations of textbooks add a caveat:

We cannot assume that what is 'in' the text is actually taught. Nor can we assume that what is taught is actually learned. Teachers have a long history of mediating and transforming text material when they employ it in classrooms

(1991:14)

This suggests the need for researchers to understand the nature of the reception or reading of educational materials such as textbooks, and no less than the ideology and politics that shape them (McCulloch, 2004). Again, this cautionary tale is highly applicable in the Philippine context, "since [they are] the setter of both the basic agenda for classroom activity, and principal sourcebook (sometimes the only one) for both teachers and students" (Hornedo et al. 2000: vi). This is evidently true because whilst Doronila's (1989) study banners the critical function of textbooks in the dissemination of official knowledge, it also highlighted the role of teachers in knowledge transmission which can be tainted by their biases and prejudices. Whilst the foregoing arguments are valid (with the primacy of the textbooks in the Philippines firmly established), this study is delimited to analyzing textual discourses and not the impact to learners of lessons or topics promoting labour migration and emigration in general. As mentioned elsewhere, further research on the topic could employ the same rigorous methodologies employed by Doronila and Constantino.

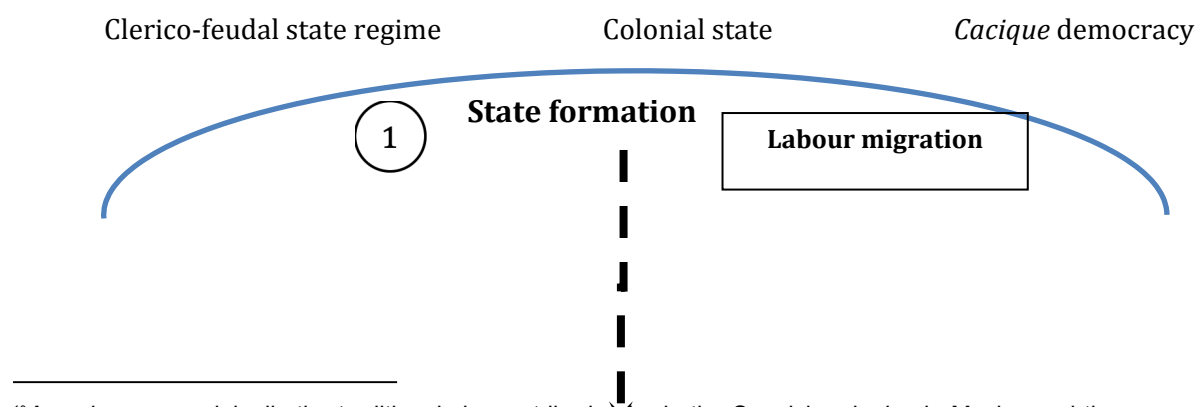
Integrative analytical framework

Given the genesis of this thesis, an integrative framework encompassing the six (6) chapters comprising it is especially necessary. This is the main purpose of the remainder of this chapter, which attempts to provide an overarching narrative of the relationship between education and the state policy of labour migration. The analysis and main arguments generated are further framed within the larger historical tableau of state formation and education development as illustrated in the conceptual diagram below. In addition to providing a visual image, this also serves to explain how my existing publications are organized as chapters, with the major conceptual threads and historical themes that link them. Readers will also find these themes recapitulated in the separate chapters, reflecting the fact that these originated as stand-alone journal articles or book chapters.

This introductory chapter thus presents an integrative analysis of the reasons for the Filipino proclivity to emigrate, with reference both to the socializing function of schooling and the skills and training infrastructure (especially for certification of vocational qualifications). As already mentioned, throughout this thesis I adopt a historical approach, tracing the origins of contemporary educational trends back to aspects of the Philippines' colonial legacy. The succeeding discussion affirms the 'traditional' and established role of education in skills development, and evidences the role assigned to schooling in political socialization, particularly as regards 'national identity' formation and 'positive' predisposition towards labour migration. Figure 1 below is a diagrammatical rendition of the narrative flow of this introductory chapter. It is divided into three major sections, which roughly are the groupings of the pieces that make up this thesis compendium.

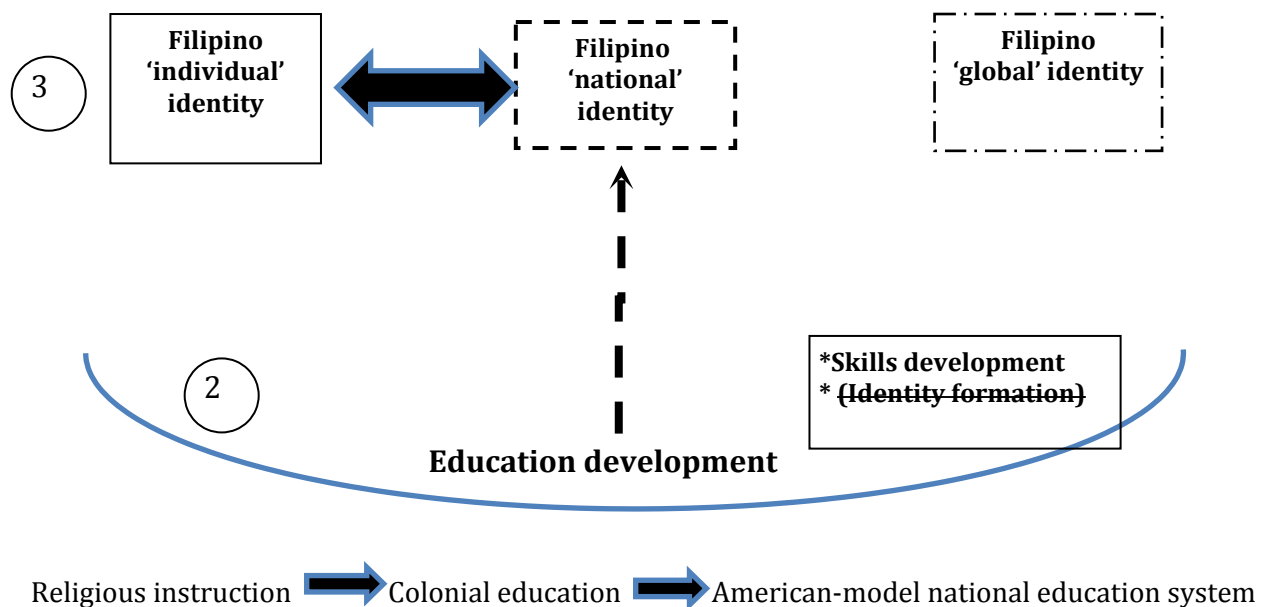
The first section **1** analyzes the historical context in broad terms, discussing the evolution of the Filipino nation-state from the colonial period to independence. It highlights the enduring power of the landholding (*cacique*) oligarchy and other powerful interest groups (including the Catholic Church) in the political and economic life of the nation. It traces the origins of labour migration to a convergence of political and economic factors. The hallmarks of *caciquismo*¹⁰ are also elaborated here, something not unique to Filipino society but which evolved from the colonial period down to modern times. The current state of 'underdevelopment' of the country has been largely blamed on the predatory, rent-seeking and monopolistic behavior of these elites. Extreme personalism or neo-sultanistic behavior is one such characteristic of a *cacique*, and it has been argued (primarily by Benedict Anderson) that Ferdinand Marcos¹¹ became the 'Supreme Cacique.' The promotion of labour export as an integral part of the state's economic strategy was Marcos' brain-child, greeted at the time by foreign and local observers as a political and economic masterstroke.

Figure 1 Analytical framework



¹⁰A *cacique* was originally the traditional clan or tribe leader in the Spanish colonies in Mexico and the West Indies. In the Philippine context, a *i* is the local political boss and oftentimes also the local landlord, or in some instances a warlord (who uses gun, goons and gold to win elections).

¹¹ The long reign of Marcos' (and his wife Imelda), from 1965 to 1986, are a major timeline in this study. In recent years, there is a renewed interest on what is generally considered as the 'dark years' of the country's history or the radical alternative view, the last attempt of Filipinos to build a great nation. Marcos and his technocrats were also responsible in systematizing the government monopoly on post-independence labour migration.



In section ² the analysis shifts to the linkages of education to development strategies pursued by the state over time. The role of education is analyzed within the social, cultural, political and economic spheres from the colonial state to the present. The investigation focuses particularly on how education was employed by the state in two areas: skills development and political socialization. With respect to the latter, the curricular areas of Language, Civics and History are the principal focus, since these are deemed critical to how Filipinos have been taught to identify with an idea of the 'Filipino nation'. This section interrogates not just the role of education in the political socialization of Filipinos in general, but also their initiation into the 'culture of migration,' in particular.¹² The box in Figure 1 containing skills development and the crossed out 'identity formation' highlights the core argument of this thesis: that the promotion of (national) identity formation has been largely neglected in state education policies. The 2 arcs depicting the continuum of state formation (top) and educational development (bottom) show how these 2 processes, which in the 'developmental states' of East Asia were directly connected and interlocking, have never been coherently or consistently linked in the Philippines. This disjuncture between two institutions deemed critical to the pursuit of development is important in helping to explain the enduring political fractiousness of the Philippines, and its economic underperformance (as reflected in Chapter 2 and in section 4.0 of this introductory chapter).

3

¹² In the 2002 national survey by Pulse Asia, one in five adult respondents said they would like to migrate. The percentage increased in the 2005 edition of the same survey, up to 26 percent and 33 percent of respondents in surveys conducted in July and October 2005 respectively expressed the same aspiration. Interestingly, this is a common view, not only among adults, but also shared by children, as 47 percent of children aged 10 to 12 admitted their desire to work abroad in the future, in a nationwide survey carried out in 2003 (Asis 2006).

Section analyzes different narratives of Filipino ‘national’ identity (or the lack thereof) and their other permutations (or substitutes) – regional, ethno-linguistic or cultural identity and the increasingly popular notion of an ‘international or global identity’,¹³ especially amongst migrant Filipino workers and diaspora populations. The focus of analysis is centered on the tensions generated in the parallel process of state-formation and educational development fuelled by the economic strategies and educational models pursued. One major argument of this thesis is the inconsistency (or absence of) a state agenda for citizenship formation (represented in the diagram by the double-headed arrow), except perhaps during the Marcos dictatorship (see Chapter 3). This has both reflected and perpetuated a nebulous conceptualization of what constitutes Filipino ‘national’ identity. This tension is illustrated by the solid lines of the ‘individual identity’ box against the dashed (and porous) lines for the ‘national identity’ box.

As argued throughout this study, the ‘national identity’ project was at best pursued in the spirit of political tokenism, oftentimes framed in the glib rhetoric of nation building. It is represented by the dashed arrow lines to signal the tentative and shifting nature of the national identity agenda of post-independence governments as reflected in citizenship education programs analyzed in Chapter 5. It is argued that this high premium accorded to developing ‘individual identity’ is mainly responsible for the weakness of Filipino national identity and lack of social cohesion. The critical aspects of education – e.g., national language, history and civics – covered in section 2.0 of this introductory chapter and in Chapters 5 and 6 are found incongruent to the purpose of imbibing a strong affiliation to the idea of a Filipino nation and in forging a national identity. This is eventually located at the extreme end of the Filipino identity spectrum, a ‘denationalized’ orientation, especially amongst labour migrants.

This lack of sentimental attachment (in Benedict Anderson’s parlance) to the ‘motherland’ has been widely seen as key to making Filipinos the ideal ‘migrant’ workers and (often) emigrant citizens (cf. David 2002; Encinas-Franco 2013; UNESCO-MGIEP 2017). They are widely hailed as the epitome of ‘global citizens’ with their welcoming attitude towards cultural assimilation/integration in their host countries (cf. Johnson and McKay 2011) and their mastery of the language of global trade. This particular aspect of Filipino identity discourse is beyond the scope of this research (as represented by a significantly less solid box lines in the conceptual diagram above), but it is an aspect of academic debate on this issue that no analysis of political socialization in the Philippines can ignore. Both anecdotal evidence (life ethnographies of migrant Filipinos for

¹³ The earliest notion of ‘internationalization’ as one of the goals of education for Filipinos emanated from the *pensionados* (returned Filipino scholars from US universities) who became key players in the education sector beginning in the Commonwealth era (1935) and after WWII. The most prominent of them was Camilo Osias who rose to become the first Filipino Superintendent of Schools and later became a senator and diplomat. He was also a prolific writer who ardently espoused an outward-oriented education and for Filipinos to avoid ‘narrow nationalism’ (cf. Osias 1940). Climaco (2005 2013) further analyzed the nationalistic elements and other philosophical underpinnings in the Philippine Readers (or the Osias Readers), a selection of local and foreign literary pieces for elementary students.

example) and more academic studies indicate a relatively strong sense of ‘global’ or transnational citizenship amongst Filipinos (c.f Hirata and Morishita 2014).

For ease in referencing and following the analytical diagram illustrated above, the table below shows the discussion coverage per chapter, which is roughly correspondent to the main themes of the study.

Table 1. Major sections/themes of the thesis

Sections	Chapters covered
1. State formation, development policy (labour migration)	2, 3 and 4
2. Education development	4, 6 and 7
3. Filipino identity discourses	5 and 6

To further underline how unique the Philippine ‘education for migration’ model is, comparisons are drawn (where appropriate) with other major labour exporting countries across different areas. But the basis of comparison mostly covers the following a) political, economic, and socio-cultural antecedents leading to the adoption of labour export policy; b) the role of the state and private sector in labour migration; and c) how the education system is aligned (or not) to support labour migration. This is elaborated in the next part of this introductory chapter.

3.0 Education, national development and labour migration: the Philippines in comparative perspective¹⁴

This study emanated from my earlier comparative research on the Philippines and the so-called ‘East Asian Tigers’: Hong Kong, Singapore, South Korea and Taiwan. In the post-war era of rapid development, the political, economic, and educational advantages of the Philippines over these countries did not translate into sustained economic and social development. The different trajectories of development of the Philippines and East Asian developmental states can be understood not only in terms of antecedents and historical context, but also in terms of very different sources of political leadership, and how they utilized education for development. In the case of the Philippines, education was largely reduced to a process of equipping citizens with exportable skills that could be exchanged for dollar remittances. Before their economies developed, the East Asian ‘miracle’ economies (especially Taiwan and South Korea), also relied to some extent on dollar remittances from migrant workers.¹⁵ But unlike them, the Philippines has not shifted beyond its ‘labour migration for development’

¹⁴ Indonesia, Nepal, Bangladesh, Sri Lanka, southern Indian states- Kerala and Tamil Nadu are other major labour exporting Asian countries which comparative analysis (or ‘reference’) is applied in this section and where appropriate to the rest of the this introductory chapter.

¹⁵ It would be instructive to investigate further how dollar remittances from their overseas workers helped the national economies of the East Asian tigers and even Japan (the progenitor of the developmental state). This is an attestation, comparatively speaking, how the Philippines largely diverged from the East Asian states, not just in post-war development strategy, political and education reforms, but also in deploying labour export as a palliative measure or to ‘kick-start’ their local economies.

strategy since its inception in the 1970s (cf. Martin 1993; Castles 2007).

Aside from becoming the first country to systematize labour export, what makes the Philippine system distinctive compared to other countries where labour migration has also become an institutionalized feature of the economy? How did the Philippine model evolve from exporting not just low-skilled workers but also scientists, health care professionals and even teachers?¹⁶ The central purpose of this section is to explain what makes the Philippine case interesting, especially with reference to the role of education in the different waves of Filipino labour migration. The distinguishing features of the Philippines in this respect will be identified through a comparative analysis of the education-migration interface (if any) in 5 other labour-exporting countries: India, Mexico, Bangladesh, Nepal and Indonesia. These countries were selected based on the size of their migrant worker and emigrant population, remittance volume and size of migration-related bureaucracy and private sector participation. These countries are also singled out for analysis here due to the active role of their respective governments in marketing 'excess labour' overseas and the prevalence of 'low skilled' workers amongst labour migrants (especially in the cases of Bangladesh, Nepal, and Indonesia).

Before proceeding further, it is necessary to insert a caveat regarding the migration data used in this section, which has been culled from reports of the World Bank, UN-IOM and other migration-related bodies. Most are conservative estimates and tend to exclude unverifiable data (including unreliable statistics reported by national governments). The recorded size of the 'migrant population,' is thus often significantly lower compared to oft-cited statistics in mainstream media or even academic studies. For example, the Filipino migrant population is often reported to be in the range of 10% of the total population, or around 10 million (Asis 2017), which is significantly higher than the 5 million estimate reported in the Migration Policy Institute (MPI) Data Hub. One possible explanation is the difficulty in accounting for two additional groups of 'migrants': temporary migrants, or persons whose stay overseas is formally reported and who are expected to return at the end of their contracts; and irregular migrants, who are not properly documented, without valid residence or work permits, or overstaying their visas (Santos 2014).

The table below illustrates the magnitude of the labour export business (and migration in general) for these 6 selected countries. In the 2017 World Bank ranking of remittance-receiving countries, 3 of these countries feature among the top 5 spots. Official migration reports peg the equivalent of these dollar remittances to their gross domestic product, ranging from 10% (e.g. Philippines) up to 26 % in the case of Bangladesh and Nepal (Sakhawat 2017; Kaphle 2014). With respect to global dispersal of these migrant workers, Filipinos rank second only to Indians in terms of the number of countries in which they are deployed. Some reports (Santos 2014; Ruiz 2014) estimate that Filipino workers can be found in at least 100 countries, giving credence to claims that Filipinos are the most sought-after migrant workers (cf. Rodriguez 2010;

¹⁶ In early 2000s, a mini-crisis erupted in some primary schools across the country when in some cases whole faculties got recruited and migrated to teach in US schools.

Ortiga 2018). Whilst India is exporting labour, it is also the top destination for workers from neighboring Nepal and Bangladesh – reflecting economic and demographic ties dating back to the colonial period. Meanwhile, migrating Mexicans overwhelmingly head north, with about 97% of them scattered across the US.

So what else does Table 2 tell us about the distinctive features of the labour export situation in the Philippines? The last column indicates the particularly elaborate nature of the Philippine state's migration bureaucracy. Apart from scouring potential labour markets, to ensuring Filipino overseas workers' welfare is looked after, the government since the 1990s has also been engaging Filipino permanent emigrants who can be potential investors or sources of technical expertise for local industries. Like overseas Filipino workers, there are great expectations from the 'returnees' of these other labour exporting countries. The 'home' countries are expected to gain from their experiences as migrants by virtue of their (supposedly) enhanced skills (human capital), access to overseas business networks (social capital), and the contribution of their earnings to financial capital and investment back home.

Table 2. Philippines vis-à-vis other major labour exporting countries

Country	Population (2017 est.)	Migrant population (2017 est.)	Remittance (2017 est. in billion US \$)	Destination countries (total; top)	Migration bureaucracy
India	1,280 M	16.60 M	68.96	84 (US, UAE, Kuwait, Oman, KSA, UK, Canada, Australia)	Ministry of Overseas Indian Affairs (MOIA); Government of Kerala, Department of Non- Resident Keralites' Affairs (NORKA); Government of Gujarat, Non-Resident Indian Division
Philippines	104 M	5.65 M	32.81	59 (US, KSA, UAE, Canada, Japan, Australia)	Office of the President, Commission on Filipinos Overseas (CFO), Philippine Congress- Committee on Overseas Workers Affairs; Department of Labour, Overseas Workers Welfare Administration (OWWA), Philippine Overseas Employment Administration (POEA); Department of Foreign Affairs, Office of the Undersecretary for Migrant Workers' Affairs
Mexico	125 M	12.96M	30.60	39 (US, Spain, France, Germany)	Unit for Migration Policy (<i>Unidad de Política Migratoria</i> , UPM); Secretaría de Relaciones Exteriores
Bangladesh	158 M	7.50 M	13.47	36 (India, Malaysia, UK, US, Arab Gulf States)	Ministry of Expatriates' Welfare and Overseas Employment (MEWOE); Bureau of Manpower and Employment and Training (BMET)
Indonesia	260 M	4.30 M	8.90	46 (Malaysia, KSA, UAE, HK, Singapore)	Ministry of Manpower and Transmigration; Ministry of Labour; Labour Placement Overseas
Nepal	29 M	1.73 M	6.94	32 (India, KSA, Malaysia, Qatar, US)	Department of Foreign Employment

Sources: Agunias and Newland (2012); Migration and Remittances Data (World Bank , 2018); Immigrant and Emigrant Populations by Country of Origin and Destination (MPI,2018); Migration Policy Institute (MPI) website.

The preceding discussion on the nature and scale of labour migration in these six countries is useful for this comparative exercise. But first, we need to understand the genesis of labour migration in each country, which in most cases dates back to the period of colonial rule. In revisiting their migration histories below, related education policies and practices are analyzed within the context of political and economic models each country has pursued. The way in which education was used (or not used) to promote the labour export enterprise is briefly considered.

Colonial labour migration

Labour export as policy emerged in these countries due to a confluence of factors, but is often attributed to colonial-era migrant labour practices and immigration policies. Of the six countries, India has the most diverse and complex migration history. Since the 19th century, Indians have established communities on every continent as well as on islands in the Caribbean and the Pacific and Indian oceans. The composition of migration flows has evolved over time from mainly indentured labour heading to far-flung colonies in the late 19th and early 20th centuries, to postwar labour for British industry, to an exodus today of high-skilled professionals to North America and low-skilled workers to the Middle East.

The British pioneered the mass deployment of migrant labourers from one colony to another. With its huge population, colonial India sustained this early system of organized labour migration for almost a century. The Americans later adopted a similar approach to addressing labour shortage in the mainland US and other territories from the early 1900s onwards. India's migration narrative started with the abolition of slavery in 1833 and was linked to the increasingly urgent need for manpower in many British colonies, particularly in sugar and rubber plantations. To meet this demand, the British established temporary labour migration from the Indian subcontinent. On the labour-supply side of the equation, poverty among the South Asian peasantry was the principal reason to leave the subcontinent. Other countries like the Netherlands and France would replicate the British 'indenture system' in their own colonies. By 1916, in response to severe criticism, the British Imperial Legislative Council abolished what has been dubbed a modern-day slavery system (Naujoks 2009). By that time, more than 1.5 million Indians had been shipped to colonies in the Caribbean, Africa, Asia, and Oceania.

This same scenario would be replayed in the Pacific at the turn of the 20th century when the US bought the Philippines from Spain. The new colony became the source of cheap migrant labour for plantations in American territories like Hawaii and Guam and in mainland agricultural estates in California as elaborated in Chapter 3 of this thesis. Filipino plantation workers, alongside other Asian migrant workers, also experienced the same severe living conditions as the Indians did at the hands of the British, French and Dutch. Isolated from the rest of the local population, workers were housed in barracks and their lives regulated in almost every regard, with severe punishments for disobedience and "insufficient work." In the Hawaii plantations, the poor living conditions, abuses and almost untrammelled employer control was like 'hell on earth' according to Filipino migrants in their letters to their families back home (cf. Mojares 2015; Bulosan 1946/2006; and Chapter 3 of this thesis).

Aside from importing cheap labour from their colonies, the British and the Americans in particular, started recruiting migrant nurses from India and the Philippines to work in the colonial metropolis. For India, it started in the mid 1860s during the American Protestant missionary movement. The American missionaries led the establishment of modern nursing schools in the country for dual purposes; education (more of Christian conversion) of Indian women, mostly from the lower classes in the Kerala region and ostensibly training a cadre of nurses for the colony's health system (Reddy 2015). The Rockefeller Foundation supported this development of a nursing elite through postgraduate fellowships in the US, which eventually paved the way for the mass recruitment of Indian nurses into American hospitals.¹⁷ But without the direct colonial ties with the United States (unlike the Philippines), Reddy (2015) hinges her argument more on what she refers to as a "hidden hand" of open door imperialism (p.26).

Meanwhile, the American colonial government had a more direct hand in opening the first nursing school in the Philippines in 1907. This proved to be very popular with young, lower-middle-class women seeking to maintain or increase their status, and aspiring to a modern American career and way of life, according to the seminal work of historian Catherine Choy (2003). And it can be further argued that from the beginning, nursing education in the Philippines prepared Filipinos to work in the United States. As Anderson (2005) noted, 'Choy insists that the attraction of the United States was not solely economic: nurses learned English, became acculturated to American practices, and modeled themselves on Yankee "originals" (339). These give credence to one of the core arguments of this thesis, that the colonial education system and the 'Americanised' national school system established thereafter, had strongly socialized Filipinos towards becoming more like their colonial masters.

Moving on to other countries with long but circular migration flows, the narratives veer more towards issues of economy, political stability, social unrest and general sense of hopelessness in the wake of abject poverty in their home communities. This is explored below and referenced with the case of the Philippines where largely similar societal conditions (and pressures) became the *raison d'être* for the 1973 Marcos edict on labour export (explored further in Chapter 3 of this thesis).

Circular migration and second generation labour exporters

The nature and scale of migration happening in countries in the Indian subcontinent and between Indonesia and Malaysia can be categorized as circular migration or repeat migration. There is an established pattern of cross-country movement between these host and home countries, usually for the purposes of employment as elaborated below. An interesting case to start with is the intertwined migration

¹⁷ One interesting theme in Sujani Reddy's (2015) seminal work on Indian nursing migration history is the unique role of the Rockefeller Foundation played in the process. It highlights how the Rockefeller Foundation deepened and extended the 'networks' laid by Protestant missionaries and which later on became conduits in US the migration of Indian nurses. This is not the case in the Philippines, where the approach was more aligned with colonial public health agenda of the Americans and foreign training programs for Filipino nurses were arranged directly between US university hospitals and the department of public health.

histories of India, Nepal and Bangladesh. India has been the primary destination or the receiving country of migrants from these two, ranked among the poorest countries in the world. Nepali migration to India dates back to the 19th century, when many Nepalis migrated to Punjab and joined the British army in India (the famous 'Gurkhas'). This phenomenon of the 'Gurkhas,' of providing mercenary-type contract services would be replicated in the two world wars by the mid 20th century.¹⁸ When India achieved its independence in 1947, some of the Gurkha regiments remained with the British army; others merged with the Indian army. Nepalese migrants also flocked to Darjeeling, not only to work in the now well-established tea estates, but also to take up a variety of other jobs in what had become a major "hill-station" or resort. In Darjeeling, Sherpas, mountain people from the Solu Khumbu area of Nepal, were employed as porters for the climbing expeditions that approached the Himalayas via Tibet.

Later on, the links established through the Gurkhas stationed overseas in Hong Kong and Singapore made these countries prime destinations for employment. In 1997 it was estimated that over 40 percent of all Nepalis living and working overseas were in Hong Kong, Singapore, and Brunei. Meanwhile, unauthorized migrants from Bangladesh have been streaming in for decades across the porous Indian border, mostly with economic reasons for migrating, such as poverty and the lack of employment opportunities, in addition to political instability. These migrants generally find work in the informal sector, often as domestic helpers, construction labourers, rickshaw pullers, and rag pickers. It is estimated that the number of illegal migrants from Bangladesh ranges from 15 to 20 million, basing the number partly on documented growth of Muslim communities and partly on unpublished government reports (Kibria 2011).

Another case is the Malaysia-Indonesia migration pattern that is considered to be the world's second-largest, long-term undocumented flow of people, overshadowed only by the traffic between Mexico and the United States (Hugo, 2007)¹⁹. Like the seemingly circular migration flow in the Indian subcontinent, the undercurrent driving migration between these two countries is mainly defined by economics. It is a movement whose history goes back to pre-colonial times, and one that has reached very substantial levels in the last two decades. The Malaysian home minister estimated that in late 2006 there were around 600,000 unauthorized migrant workers in Malaysia (most of them Indonesians) despite periodic sweeps, deportations, and amnesties (ibid). Males, who dominate the flow, are concentrated in the plantation, timber, manufacturing, and construction sectors. Malaysians generally shun these low-skilled, poorly paid and low-status jobs. Additionally, the tendency for migrant Indonesian workers to become permanent or long-term residents has been particularly marked in East Malaysia. The population of the state of Sabah has soared from 697,000 in 1979 to almost 3 million in 2004, and migration from Indonesia and the Philippines has played a major role in this growth. This gave rise to the ongoing diplomatic crisis on 'paperless' or 'stateless' citizens (Filipinos

¹⁸ The US navy also massively recruited Filipinos during the 2 world wars and suffered massive casualties. They hold the distinction of being the first minority group (aside from the African-Americans) to be officially enlisted in a US military branch.

¹⁹ Massey et al. (1987) describes migration between Mexico and the US as "the largest sustained flow of migrant workers in the contemporary world" (73).

and Indonesians alike) in Sabah.

The above portrayals of migration flows imply historic ties anchored on shared colonial experience, religion, culture, language and to some extent the sheer absence of concrete borders. However, the expanding global economy in the postwar decades created a huge demand for cheap migrant labour, thus encouraging governments to export their 'excess' human resource. The Philippines in particular was quick to establish itself in the mid-1970s as dependable supplier of skilled workers when rising oil prices caused a boom in contract migrant labour in the Middle East.²⁰ From the mid-1960s to the mid-1980s, the government of dictator Ferdinand Marcos saw an opportunity to export young men left unemployed by the stagnant economy (and also women as detailed in Chapter 7 which discusses here on Japan-bound entertainers) and eventually establish a system to regulate and encourage labour outflows.

So as the pioneer labour-brokerage state, how distinct is the Philippine model compared to those of second-generation labour exporter countries like Indonesia, Nepal and Bangladesh? For this section I am categorizing these three countries (and the Philippines) as the 'classic' labour-brokerage states as their respective governments have actively scouted foreign markets for opportunities for their excess labour. The other two, Mexico and India, though conventionally lumped with other 'labour-exporting' countries, have adopted a different approach. A review of labour migration related policies and bureaucracy for India and Mexico identifies an emphasis on migration management rather than labour brokerage. As mentioned earlier, engaging their large diaspora populations has come to be seen as a more lucrative and sustainable strategy for India and Mexico.²¹

Compared to the Philippines, Bangladesh, Nepal and Indonesia's labour export programs are struggling under a myriad of problems; ranging from illegal recruitment, deployment of unskilled workers, corruption in government regulatory agencies, and illegal or overstaying workers among others. These are the same problems that Marcos and succeeding governments had to tackle in the early decades of the Filipino labour export program. (This is discussed with reference to the case of Japan-bound Filipina entertainment workers in Chapter 7 of this thesis.) A case in point is the deployment of lower-skilled Bangladeshi workers. The high costs of arranging employment abroad have encouraged them to overstay their work visas once they have migrated. In addition, the corruption of the recruitment industry has led to cases of workers unwittingly purchasing fraudulent documents, only to find that they are unauthorized immediately upon arrival at their destination. This often resulted in increased risk of forced labour, exploitation, abuse, and even

²⁰The "tiger economies" of Asia now rival the Middle East as the major destination for temporary workers, while migrants who go to North America and Oceania are far more likely to stay on as permanent immigrants. The occupations of migrants have diversified to include professionals, factory workers, and domestic workers, while the tradition of Filipino construction workers, sailors, and nurses remains strong.

²¹ A prominent example is the Program for Mexican Communities Abroad (*Programa para las Comunidades Mexicanas en el Exterior* or *PCME*) which was established with the objectives of helping Mexican migrants maintain cultural links with their country, encouraging investments in their communities of origin, and helping them to secure their rights while abroad. This was merged with another program to create the Institute of Mexicans Abroad (*Instituto de los Mexicanos en el Exterior* or *IME*). The Institute includes all Mexicans communities, namely the hometown associations of Mexican nationals and U.S. citizens of Mexican origin (Fitzgerald 2009).

human trafficking of migrant workers in their destination countries. Some find themselves in situations of forced labour or debt bondage where they face restrictions on their movements, non-payment of wages, threats, and physical or sexual abuse.

In the case of Indonesia, most legal labour migrants are unskilled, and the majority are women. These women are predominantly employed as domestic workers, particularly in Saudi Arabia, Malaysia, Brunei, Singapore, and Hong Kong. In fact, Indonesia is one of the largest countries of origin of female migrant workers who are employed in domestic situations as household help and caretakers. These women can be vulnerable to exploitation not only by virtue of being a migrant (often undocumented) and a woman, but also because local protection agencies do not view households as workplaces that can be regulated. The same grim scenario awaits the labour migrants of Nepal, one of the newest participants in the mass migration of its low-skilled workers. Reports highlight how some suffer depression as they leave tiny villages and travel alone to foreign cities where they cannot speak the language. Others face abuse, including long hours and beatings. Each year, hundreds come back in plywood coffins. A Human Rights Watch senior researcher in New York also highlighted that unlike countries such as the Philippines and Indonesia, Nepal does not have an older generation of migrant workers who can inform younger ones about the expectations, problems and dangers of employment overseas (Kaphle 2014).

Compared to the Philippines, many of these second-generation labour-exporting countries are facing great challenges in setting up a more sophisticated labour export system. Research highlights how Nepal was among the first to codify a national policy for their labour export program: the Labour Act of 1985 (the equivalent measure in the Philippines was the 1973 Labour Code). Though it has facilitated Nepali migration to about a dozen countries, the government has yet to develop a more coherent labour export policy. Every five years, the government of Nepal produces a plan as a policy guideline. Although the current 10th Plan recognizes both the contribution remittances make to the national accounts and the increasing demand for Nepali workers abroad, the government is struggling to keep up with these trends. In addition, foreign labour migration from Nepal is still largely a privately organized affair in which individuals make use of their own personal networks or make arrangements through a number of private, government-registered manpower or recruitment agencies. This 'private' recruitment system is vulnerable to corruption, which plagues the current Nepalese migration system.

Meanwhile, compared to the Philippines and other migrant-sending countries, Indonesia is slower in developing effective policies and programs to protect labour migrants (Hugo 2007). But this attitude is changing with both government and nongovernment organizations (NGOs) taking more action. In particular, NGOs are organizing migrant workers, providing information and training, raising public awareness of issues concerning migrants, and documenting the migration experience. As early as the mid 1970s, the Philippine state had taken over labour migration from the private sector by organizing a dedicated branch of the bureaucracy to oversee it. This pioneer system of labour export management is elaborated in various sections of Chapters 3 and 7.

For prospective Bangladeshi migrants, the government is yet to address issues over the high migration cost and the existence of middlemen in the recruitment process (Sakhawat 2017). In Bangladesh, as in many other migrant sending states, the recruitment of less-skilled workers for overseas jobs has become a large and lucrative transnational industry. The industry is composed of an array of intermediary services in the foreign worker recruitment and placement process, including entrepreneurial “scouting” agents who locate would-be migrants in rural parts of the country. These agents negotiate on behalf of potential migrants with the recruiting agencies, which in turn negotiate with the international sponsoring companies and other intermediaries the migrant-receiving states.

The apparent success of state interventions in improving protection of migrant workers has led to an international perception that the Philippines epitomises ‘best practice’ in migration management (Abella et al. 2004). The Philippines’ migration policies and institutions serve as a working template to be emulated by other migrant-sending countries and are invariably cited in global policy debates on migration management (Agunias and Ruiz 2007). Numerous policy reports published by international organisations extensively cite the Philippines for policy innovation and successful state interventions (IOM 2011). The International Labour Organization (ILO) even organised a training module based on the Philippine practices stating that, ‘the Philippine overseas employment programme was chosen because the Philippines is widely regarded to have developed a model of how foreign employment should be supervised by the State’ (ILO 2005:27). In fact, the Philippine state has been setting *de facto* international standards in government-led migration management in the developing world.

But to what extent is the Philippine model applicable to these second-generation labour exporters? Aside from establishing a sophisticated and dedicated bureaucracy to support labour migration, what other complementary strategies were pursued by different Philippine governments to sustain this profitable state enterprise? A central claim of this thesis is that the Philippine state successfully harnessed education to support its labour export strategy. The foregoing comparative investigation has not identified education as a key element in the models of the three major labour-exporting countries (India and Mexico are excluded since they focus more on emigration and diaspora engagement). A possible explanation is because low-skilled workers comprise the majority of their overseas contract workers, in contrast to the case in the Philippines, which deploys a sizable group of professionals or highly skilled migrant workers. Nevertheless, some references to the role of education are to be found in the literature, as discussed below.

Education and labour migration

As analyzed throughout this thesis, key sectors of the Philippine education system were subjected to sweeping reforms as part of the design to align it with the state’s labour export program. Over time, different governments invariably prioritized policies like English as MOI, expansion of technical-vocational education, adopting ‘international’ standards in college courses that catered to a high foreign labour

market demand for graduates (cf. Ortiga 2018)²² and granting greater autonomy to the higher education sector in developing programs. All these were ostensibly implemented in support of the flagship government program of training Filipinos with exportable skills.

So compared to the Philippines, up to what extent are education-related programs and policies in these other countries aligned to their labour export programs? The comparative review conducted for this section reveals a limited scope compared to how expansive the reforms were in the Philippines.

Compared to the Philippines, perhaps these second-generation labour-exporting countries are still in the catch-up phase of deliberately aligning their education programs and policies to serve the purposes of their respective labour export programs. Bangladesh, for example, is more concerned only now with technical education and skills development. A key priority in the 2017 national budget was the establishment of short courses to help develop the skills of migrant workers in 48 different trades. This is being implemented in 70 training centres for skills development. The Bangladeshi government is also currently constructing 40 additional training centres with 50 more planned in the future. The main reason they have pursued these kinds of initiatives is ‘to train (our) migrant workers so that the chances of them being exploited when they reach their destination countries will be zero,’ according to the country’s Director-General for Manpower, Employment and Training (Sakhawat 2017). This addresses the reality that the Bangladeshi migrant workers are the least skilled among the different worker groups compared in this section. Their low-ranking status has made them vulnerable to abuse and exploitation, and had also left them a bad reputation as troublemakers, resulting in a series of recruitment stoppages by a few countries in the Gulf region in the last 10 years (ibid). Comparatively speaking, the Philippines has clearly advanced in this sector of technical-vocational education (TVE) given its long history dating back to the early 1970s. Today, the sector is more focused on ensuring alignment of qualifications earned in basic education, technical vocational education and training and higher education to ensure recognition and transfer learning credits (Philippine Qualifications Framework 2016). This ‘credentials-bridging’ mechanism for Filipinos with TVE training was meant to boost their employment opportunities, locally and especially abroad.²³

Although the introduction or strengthening of English language instruction in all these labour-exporting countries is in full swing, the literature reviewed does not directly relate it to the purposes of labour migration. Except perhaps in the case of Mexico where the outgoing Peña Nieto administration has been able to forge a promising *Pacto Por Mexico* (Pact for Mexico). Educational reform is a key component of the pact, although its focus does not include English language proficiency. Still, English is being introduced in educational curricula nationwide,

²² An ethnographic study, Filipino sociologist Yasmin Ortiga’s (2018) book have insightful findings on how university owners, college deans and professors are deliberately aligning their curricular offerings and pedagogical practices to the current (and projected) demands and expectations of their students prospective overseas employers.

²³ The PQF is also part of ASEAN-wide initiative of ensuring region-wide mechanism for comparability of qualifications vis-à-vis international benchmarks and recognition across national systems of education of ASEAN member states. This would eventually lead to greater mobility of professionals and skilled workers.

and many point to such actions as improving would-be migrants' chances for success (Alba 2013).

Meanwhile in Indonesia, the 'creeping' prominence of English in the national life as part of what Gellert (2015) describes as the new ideology of development in Indonesia that is partly cosmopolitan and individualist. Mainstreaming of English is also part of the government's efforts to "go international" via the implementation of International Standard Schools (ISS). In 2003, the new Education System Law required the government to establish one international standard school at each level in each district. This drive towards 'internationalisation' is composed of "global" Organization for Economic Co-operation and Development (OECD) standard curricula and the use of English as the language of instruction (Gellert 2015:385). Nevertheless, Indonesian education reform discourse is still silent on how emerging policies on medium of instruction can affect the expanding labour export program of the country. For now, it seems like Indonesian officials are more preoccupied with a 'linguistic-imperialism-minded and politically inspired view' against foreign language education (notably English) when they recently decided to omit English from the Indonesian basic education curriculum (Saputra 2018). This move was greeted by protests in some quarters arguing that English should not be viewed as a threat to the existence of Bahasa Indonesia but an opportunity to prosper in world.

Overall, the thin corpus of literature on the education-labour migration nexus in these labour-exporting countries implies either limited academic attention to the topic or simply an absence of consideration of labour migration on the part of education policy-makers. Here I have primarily focused on aspects of education at the compulsory level (e.g. language of education, technical skills development, etc.) and their alignment (or lack thereof) with the promotion of labour migration. This correlation is much more obvious in higher education (e.g. nursing education, English language proficiency, international accreditation, etc.), which is not the main focus of this thesis; rather than analyzing the behavior of young adults actively seeking qualifications marketable overseas, my main concern here is to analyze how mass schooling has assumed a role in the early shaping of identity and values in ways that may contribute to the propensity to migrate (though in Chapter 7 I do deal with one instance of accreditation of tertiary-level qualifications).

The comparative discussion above broadly sketches how distinct the Philippines has become as a labour-brokering state. It illustrates how elaborate the bureaucratic machinery and policy frameworks in place which are being touted as a model for other labour exporting countries. The extent of this 'modeling' though is heavy on the labour brokerage aspect of the equation. Programs and practices in harnessing education of workers towards development of exportable skills are yet to be adapted or borrowed by other labour exporting states covered in this study. To better understand the evolution of the Philippines as a key player in the labour exporting business we need to look at the historical antecedents of this phenomenon. The next section locates the emergence of labour migration discourses in the interlocking narratives of Filipino state formation and education development.

4.0 State formation, education and labour migration

This section focuses on the analysis of the structural features and broad strategies of the Philippine state in pursuit of economic and social development. Specifically, it interrogates the official vision of education's role in economic development, and how this is intimately related to labour migration.

As mentioned, this research project began with a general inquiry into the phenomenon of 'underdevelopment' in modern-day Filipino society. Early achievement of high levels of educational access and literacy and a relatively democratic socio-political system did not translate into social reforms and economic development. Instead, the inertia of the *status quo* prevailed, transforming the country into one of the most highly non-egalitarian and poor democracies. The critical factor here is identified to be the predatory nature of the modern Filipino nation-state dominated by the same family networks originating from the Spanish-era *hacendero* class in collaboration with its former colonial masters. Existing literature on the evolution of the modern Filipino state describes its current incarnation as 'cacique democracy, a formal system of democratic politics but underpinned by a feudal pattern of land-ownership and the social order in the country. Anderson (1988:5) traces the heyday of *cacique* democracy to the independent (post-WWII) Philippines and observes how,

the oligarchs more and more followed Chairman Mao's advice to walk on two legs. Manila was where the President resided and where Congress met, where pork barrel funds were dealt out, where licences and loans were secured, where educational institutions proliferated, and where imported entertainments flourished. The dynasties began leaving their haciendas in the hands of sons-in-law and bailiffs and moving into palatial new residential complexes on the outskirts of the old capital.

But under the Marcos regime, even before the declaration of Martial Law in 1972, the Philippines was transformed into a more 'complex hybrid' of *cacique* democracy. Anderson (1988:29) heaped on Marcos a plethora of descriptors as the Supreme *Cacique*;

From one point of view, Don Ferdinand can be seen as the Master *Cacique* or Master Warlord, in that he pushed the destructive logic of the old order to its natural conclusion. In place of dozens of privatized 'security guards', a single privatized National Constabulary; in place of personal armies, a personal Army; instead of pliable local judges, a client Supreme Court; instead of a myriad pocket and rotten boroughs, a pocket or rotten country, managed by cronies, hitmen, and flunkies. But from another viewpoint, he was an original; partly because he was highly intelligent, partly because, like his grotesque wife, he came from the lower fringes of the oligarchy. In any case, he was the first elite Filipino politician who saw the possibilities of reversing the traditional flow of power. All his predecessors had lived out the genealogy of mestizo supremacy—from private wealth to state power, from provincial bossism to national hegemony. But almost from the beginning of his presidency in 1965, Marcos had moved mentally out of the nineteenth century, and understood that in our time wealth serves power, and that the key card is the state. Manila's Louis Napoleon.

A wide array of literature (cf. Aquino 1987; Bello 2009; Javate-de Dios et al. 1993) on the Marcos regime provides material evidence and elaboration on such a hard-

hitting portrayal by an outside observer like Benedict Anderson (1988). The catastrophic outcome and the lasting impact of the conjugal rule of the Marcoses are revisited in this study, especially in the context of comparisons with the East Asian developmental states (see Chapters 2 and 3).

But why is there a need for such critical inquiry on the Marcos years, which extends beyond the grand tales of corruption and economic dysfunction? Because it was also the period when the 'labour-brokerage state' emerged, to extract gains (political and financial) in the commodification of the educated unemployed for overseas work. This is widely covered in Chapters 3 and 7 of this thesis (see also Rodriguez 2010 for a more focused discussion.) However, alternative arguments tend to highlight the benevolent predisposition of the ruling elite, and how they came to 'accommodate' the migration issue as they realized that labour migration was a low-threat political agenda that largely left intact their vested interests (Yoon 2016). This is because ruling elites, who not only dominated the political offices but also monopolised much of the economic sector, were not entrenched in the migration business when the government attempted to reform the recruitment industry in the 1970s (Ruiz 2014). Nonetheless, this study argues that labour migration was already part of the national life even before Marcos' ascent to power. His technocrats just systematized and transformed it into a government monopoly. Alignment of education policies and systems in support of the labour export strategy was orchestrated thereafter as elaborated in Chapters 2, 3 and 7.

But the post-Marcos era also did not bode well for the country and its long-term negative effects on the economy and political culture are still being felt to this day. Most scholars agree that whilst the 1986 'People Power' toppled a dictatorship and inspired similar movements around the world,²⁴ its revolutionary potential fell far short of people's hopes and expectations of change, and that the succeeding governments were basically 'restorationist' (Hutchcroft 1991). What was 'restored' was yet another variant of 'elite democracy' (Bello and Elinson 1981) or the resurrection of the historical '*cacique* democracy' (Anderson 1998; cf. McCoy 1987). This was dominated by the same predatory oligarchy composed of a small number of families²⁵ linked to each other by personalistic ties of blood or marriage as well as shared political and economic interests, intent on extracting 'booty' (in the form of rents) and other privileges from the state with little interest in formulating coherent economic policies or in redistributive justice (Hutchcroft 1998). Scholar Paul Hutchcroft (1991) observed, despairingly, that 'the more things change, the more they stay the same' (414).

Even before Marcos, the Philippines was already a typecase of "extreme patrimonialism," a "neosultanistic regime" in Weber's terms (Chehabi and Linz 1998:4-5 in Hau 2016), in which the state is dominated by a strongman who rules

²⁴ EDSA People Power, the 4-day 'bloodless revolt' in February 1986 had a 'demonstration effect' on neighboring countries (cf. Hau, 2016) on neighboring countries such as South Korea (where 'people power' was invoked by opposition leader Kim Dae Jung when he called for constitutional change and democratization in Korea (cf. Huntington 1991), Taiwan, Indonesian and Bangladesh, and less successfully in Burma and China, as well as on Eastern European countries such as the former Czechoslovakia, East Germany, Romania and Serbia (cf. Huntington 1991; Thompson 2004).

²⁵ Alfred McCoy (1993/2009) infamously labeled this incestuous political relationship of Filipino elite families as an 'anarchy of families.'

his country arbitrarily, transforming the administrative apparatus and the military force into “purely personal instruments of the master.” In this formulation, “personalism,” personalistic interests and ties in the form of patron-clientilism” are the key organizing principles, thereby blurring the distinction between public and private as well as between state and regime. This feature of the Philippine state and Filipino politics has been widely studied by local and foreign scholars (c.f Paredes 1988; Owen 1971; Lande 1965; McCoy 1993/2009; Sidel,1997). This theme is also covered in Chapter 4 which briefly traces the rise of ‘strongman syndrome’ in the Philippines especially during the Commonwealth era under the American tutelage. Meanwhile, Chapters 5, 6 and 7, tackles how this ‘personalistic’ approach to governance are mirrored or directly translated into educational programs and policies in consonance with the agenda of the sitting president.

This socio-political landscape is also perpetuated by the dominance of dynastic families. Society in the Philippines is often described as appropriated by families (McCoy 1993 /2009), with the picture of the state presented in public discussion as one that is malfunctioning. As Kaelin (2012) argues, states come and go but families persist. Thus analyzing Philippine society, the apparently strong family is oftentimes put in relation to chronically lamented weak state. Webs of patron-client relations structure society and politics, with political parties described as associations of powerful families. As Chapters 2 and 3 of this thesis will show, the Philippines offers a classical case of a post-independence weak state confronting a strong society dominated by traditional elites and local strongmen emanating from these powerful political clans. So how do we contextualize the seemingly intractable role of the Filipino family in the country’s political sphere?

The 1987 Constitution of the Philippines explicitly refers to the ‘Filipino family’ as the ‘foundation of the nation’ that will work towards national solidarity and ‘actively promote its total development’ (Article XV). Scholars in turn identify the family as the ‘basic unit of Philippine society’ (Medina, 2001) and the ‘be-all and end-all’ to the life of every Filipino, literally the center of their universe according to renowned Filipino anthropologist F. Landa Jocano (1998). Dutch scholar Niels Mulder (1997), in his critical assessment of the family in the Philippines, points out that the family is the ‘wellspring of a meaningful existence, of identity and fulfillment’ and that it is ‘the moral world par excellence’ (in Kaelin 2012:91). This pervasive view in turn influences the political and social views of most Filipinos in particular. This further determines the strength (or weakness) of their identification to an abstract notion of a ‘Filipino nation’ under the looming shadow of the ‘family.’

The role of the family in the history of Philippine state formation has been a favorite subject of social science research in the last few decades. Alfred McCoy, in his introduction to *An Anarchy of Families* sketches national history in the West as an analysis of the sum of its institutional parts-corporations, parties, unions legislature and executive. The family then is treated in these accounts of national history as a mere private institution with no bearing on the history of the political organization of the country (2009:82). He then paints the Philippines as a study in contrast, where the family plays an important role on the political plane as he points out how ‘elite families can be seen as both object and subject of history, shaping and being shaped by the processes of change’ (ibid). Elite families, in his account, provided the

continuity, whilst the state has broken down several times in the course of the 20th century. This view is supported by the work of the Filipino anthropologist F. Landa Jocano, which highlights how the family is normally the basis of local groups alignment and institutional organization (Jocano 1998). Social groups are usually built around the family. As mentioned above, even political parties sometimes become a mere form of associations of families which makes other scholars to concede that the family is the most significant political unit of the Filipino nation-state (Fegan 1993; McCoy 1993). In short, in various aspects of community life, the family serves as the basic principle of organization from which further network of kinship extends into the larger society. As Mulder (1997) argued, Philippine society is 'imagined' to be centered on the family with the dominant view of 'social life and society in general, as a kind of an aggregate of individuals who cluster in families' (97).

In the educational sphere, Niels Mulder analyzed how Filipino textbooks use the family as a model or metaphor for the state. The view that it is the government's task to look after the well-being of society at large and that in turn, citizens have to support this caring 'benevolent government' is perpetuated (Kaelin 2012:100). The resulting image (of the state) which becomes familiar to the child is familial. This is mostly the case in Asian context wherein state-society relations are cast in familial metaphors. The government becomes a super-parent, the world outside the home becomes an extension of the family (Mulder 2000). The clearest attempt to imagine the state as an extensive family was made during the Marcos era. The First Couple Ferdinand and Imelda Marcos wanted to be imagined as the parents of the nation-state (Kaelin 2012; Espiritu 2017) and used the traditional Filipino family values such as sense of unity, loyalty, and trust to get rid of what were considered negative values of Philippine society (i.e. lack of patriotism, factionalism). Ironically and perhaps not too surprisingly, this open proclamation of family values vis-à-vis the state was accompanied by an unprecedented plunder of the nation's coffers (McCoy 1993:100-101). In the end this highly personalized (and family-centered) worldview became an impediment to the development of a wider institutional sphere based on abstractions such as the 'rule of law' and the 'common good.'

So how is the prevailing political culture in the country affecting or being channeled in the education system (as elaborated in chapters 3, 4 and 5)? How do the state and private sector negotiate over their competing agenda in education? In particular, how is the process of labour migration serving the interest of equally powerful non-state actors, like the Catholic Church and Filipino oligarchic families? While dominating the largely private higher education system, how do they contribute to shaping educational institutions and promotion of labour migration?²⁶ Historical evidence suggests that education was not seriously viewed as a critical arena in 'nation-building', except maybe in the failed experiment during Marcos rule. This was partly a result of the early adoption of the American model of 'educational success' equated to individual social mobility, usually defined by accumulation of personal wealth and prestige. As Filipino scholar E. San Juan (1983) argued,

²⁶ Ruiz (2014) has interesting findings on the role of the private higher education system in labour export program and the transformation of the Philippines into an 'emigration state.' But he stopped short from indicting the monopoly of the private Catholic universities of the higher education sector.

“it must be recalled that from 1900 onwards, the ‘Americanized’ educational system of the Philippines effectively instilled in the old and young generation the bourgeois values of possessive of individualism and social-Darwinist ethics of competition (the “rip-off mentality”).....(4)

How can this be related to the construction of Filipino national identity and the tendency of Filipinos to migrate overseas to work or relocate permanently? Two chapters of this thesis review the different narratives on how education had a more formal, conservative and limited role in citizenship formation during the different colonial periods. Under Spain, for example, education’s main purpose was to reinforce a Catholic identity. The Americans replicated their education system aimed at nurturing an individual identity, which in the process led to the Americanization (peddled as ‘modernization’) of Filipinos. It re-oriented Filipino aspirations towards the American way of life, thereby igniting the dream to emigrate in the colonial metropolis. During the short-lived Japanese period, education towards a pan-Asian identity (regional identity) was an expressed goal by the Japanese colonizers and their Filipino collaborators. There was also strong support for a curriculum using a common ‘national language,’ celebrating local culture and customs, among others. Nevertheless, the destruction and atrocities the Japanese inflicted onto Filipinos during World War II would cast a great shadow over any positive contribution Japan may have left on the educational system. This is further discussed in the succeeding section while historical evidences in support of these findings appear in Chapters 5 and 6.

It was during the post-colonial era that debates on the national identity or nationalist consciousness (and the lack thereof) came to the fore. Since independence in 1946, at least 10 official curricula in basic education were briefly reviewed and analyzed for this research area, with particular focus on history and civics education and medium of instruction. If plotted on a timeline, emerging patterns would approximate a synchronized revision or redevelopment in the school curriculum every time a new chief, secretary or minister is installed in the education department. This somewhat mirrors the patterns of political leadership in the country (as discussed in Chapters 2, 3 and 4) and mimics the personalistic approach of homegrown leaders (borne of the *cacique* class as elaborated further below) in political governance. Chapter 5 in particular highlights the adverse effect of this case of political dynamics spilling over into the education sector particularly in catalyzing citizenship education programs for the purpose of national identity formation. The next section looks into the genesis and overlay of particular themes, such as national identity and national consciousness discourses in the history and civics education curricula.

However, laying the blame on a poor imitation of the American democratic system, which spawned a corrupt political elite, can only explain so much. Along the way, the veritable Westernization (‘Americanization’) of the indigenous elite gave birth to a new breed of Philippine privileged class (albeit still dominated by scions of Spanish –era *caciques*), the Filipino version of the French bourgeoisie. They are known to be apolitical so long as the political changes never affect them. Traditionally, they are individualistic (by virtue of their American education), unorganizable, uninvolved, and said to be incapable of sustained political action.

Most have been content to cast their ballots at election time, and leave the rest to the politicians. They expect these politicians to protect their interests, as members of the same social class, and part of the system of elite democracy which keeps political and economic power in the hands of the few. They envision change taking place within the institutions of American-style democracy - characterized by universal suffrage, political liberties, the rule of law and political competition and, crucially, security of property and low taxation. These political ideals readily embraced by the new English-educated middle class clashed with the semi-feudal social structure in post-Spanish Philippines. Moreso, progressive ideas scare them, especially structural changes that will redistribute land, share profits, and empower the masses. Under normal circumstances they will support change only if this is non-violent and parliamentary. But at times they have shattered these stereotypes, at least during the long struggle against Marcos military rule and when they joined the 'masa' (the people) revolution in 1986 that toppled the dictatorship. They became born-again to people power, to pluralist politics for a more popular democracy (Francisco and Ariola 1987).

Unfortunately, their hopes for a political and social renaissance following the People Power Movement of 1986 ended in disappointment. The post-EDSA state-society relations reverted to the factional politics of the past based on networks of old dynastic families. Amongst the ranks of the middle (working) class, the heightened nationalist consciousness demonstrated against the Marcos dictatorship had significantly waned. This was partly due to the ruined economy left by the Marcoses, which for this significant segment of the population meant prioritizing their families' survival over political participation. This, in turn, has dampened their renewed sense of patriotism and blunted further nationalist sentiments. Amidst great expectations, the succeeding post-Marcos government also failed to improve their lot. Instead of ensuring local employment and ramping up social reforms, the state resorted to expanding the Marcos-initiated labour export business. Thus, more than three decades after Marcos, the exodus of Filipino workers continues. Some quarters in the political establishment frame this phenomenon as voluntary or a matter of choice for most Filipinos and their families. But is this really the case? Is it really secondary nature for Filipinos to search for opportunities abroad after gaining schooling credentials? What plausible explanations can shed light on this behavior and disposition towards labour migration and emigration in general? What is the role of education in nurturing these 'emigrant dreams' of most Filipinos?

5.0 Education, national identity formation and the Filipino propensity to migrate

The following section deals with the role of education in shaping (and reflecting) attitudes or sentiments associated with a propensity to migrate. This further narrows down the focus from the previous section and addresses how the dominance of *caciquismo* in Philippine society is related to weak social cohesion and weak national identity. Weaving alternative 'nationalist' narratives (cf. Chapters 3 and 5 that trace the emergence of political discourses on OFWs) to justify the continuing commodification of the educated unemployed, the *cacique* -ruled state

have capitalized on the seemingly natural predisposition of Filipinos to leaving the country– temporarily or for good. As discussed in different parts of this thesis, the schooling experience (and the resulting political socialization) is being viewed as a critical element in engendering a narrow understanding and demonstration of nationalism and national identity. So how is this weakness in national consciousness (and identity) reinforced and reflected in the school curriculum?

Philippine migration, as mentioned earlier, has been extensively discussed in literature on politics, economics, and the study of the Filipino diaspora. But the connections between education and economic migration have received less attention, with a few notable exceptions; such as Ruiz's (2014) work highlighting the role of private universities in promoting the state's labour export policy. Existing (although now very dated) studies on basic education (Constantino 1982; Doronila 1989) show a pervasive orientation of the curriculum towards 'education for migration.' For instance, the OFWs are now hailed in textbooks, and discussed in classrooms, as '*bagong bayani*', literally, 'modern day heroes', thus, fostering a mindset in which heroism and patriotism are best demonstrated by working abroad to help the family and the country (see Chapter ____). Conversely, in the same textbooks, 'model Filipinos' range from international artistes (at the West End and Broadway, and in Hollywood) to international sports stars. The education system has accordingly maintained the privileged status of English as the medium of instruction, ostensibly to ensure the employability of Filipinos abroad. How did we arrive at this simplified sum total of the schooling experience Filipinos and equated with their seemingly positive predisposition towards migration?

The establishment of mass schooling in the Philippines is credited to the Americans who bought the islands from Spain and occupied them from 1899 to 1946. Although there was some form of public 'instruction' during Spanish rule (1565-1898) performed by religious orders, only the children of the elite reaped its benefits including the country's national hero Jose Rizal. Meanwhile, as previously mentioned, the educational legacy (i.e. use of national language, reclaiming 'Asian-ness' amongst Filipinos) of the short-lived Japanese occupation (1942-45) was overshadowed by the destruction and suffering brought by WWII. I have underlined the role, which these three nations have played in the process of constructing a Filipino national identity in Chapters 5 and 6 of this thesis. Whilst they tend to be portrayed in textbooks as either benign (USA and Spain) or brutal (Japan) colonizers, there is a strong emphasis on their 'positive' contributions to the country and specifically to the education of Filipinos.

There are few critical studies of different colonial education systems in the Philippines (c.f. Alzona 1932 -Spanish and early American, Bazaco 1939- Spanish, Osias 1921 and Lande 1956-American periods) and practically no historical and comparative studies of the influence of the colonisers/invasers on the education of Filipinos. Studies of curricula and textbooks are severely lacking. The classic studies are already dated (c.f. Constantino 1982 on World Bank-funded textbooks; Doronila 1989 on national identity formation). What emerge from these studies are: a depoliticized portrayal of colonial histories, failure to implement languages of education policies and a generally bland brand of nationalism in the curriculum. These seminal works amount to an indictment of the education system's failure to

create a strong sense of national identity amongst Filipinos and an uncritical portrayal of the foreign 'Others' that have invaded/occupied the country.' A major component of this thesis consists of an analysis of (1) how foreign 'Others' have been portrayed in the curriculum and textbooks as well as (2) the processes by which those portrayals were decided.

Incidentally, the same caches of textbooks were featured in Doronila's (1989) seminal study, which found Grade 5 school children possessing a 'weak' Filipino national identity. This was aside from the fact that at that time in the 1970s, their production and distribution was dubbed the biggest textbook project in the world (Constantino 1982) funded by a World Bank loan to the Marcos government.

Overall, education has not been viewed in the Philippines as a critical arena for national identity formation. This thesis argues that national identity formation was never 'problematized' in the first place, even by Filipino nationalist scholars and educationists (except for a handful like Doronila and Constantino). Most articulations were in the realm of political rhetoric and anti-establishment propaganda (mostly anti-government and anti-American). This thesis reviews and evaluates archival materials to provide material evidence supporting early criticisms (such as those of Constantino) of the education system's failure to foster a Filipino 'national identity.' It likewise complements Doronila's seminal work (1989) on national identity formation among elementary children through political socialization in the teaching-learning process. Using content analysis of the same Marcos-era textbooks that Doronila used in her study, evidence found suggest explicit 'socialization towards migration.'

This makes the Philippines fairly distinctive amongst East Asian societies for the weakness of government control over education, and the related failure to use school curricula to promote a strong, cohesive national identity (see Chapter 2). A strong sense of national identity involves two discourses (Ozkirimli 2010), which are transmitted through the school curriculum, one relates to who we are/ are not and the other delineates the boundaries of the nation. For the Philippines, the public school system developed with the arrival of the Americans, and therefore state and national identity formation was not part of an 'indigenous' nationalizing project (in contrast to the experience of East Asian developmental states), and in the post-colonial period it has not been successfully harnessed to achieve that purpose. The assumption underlying this study is that the current approach to national identity formation generally, and specifically the approach to the portrayal of foreign others, has its roots in the systems and approaches introduced by the Americans since 1901 (cf. chapter 5 and 6). Thus my current study is a contribution to larger debates over why education has failed either to develop a strong sense of national cohesion (cf. Doronila 1989) or train workers to meet the country's economic needs (de Dios et al. 1995).

Another area topic explored in this study is the anointment of Filipino migrant workers as model 'global citizens,' and how this further complicates the competing Filipino 'national identity' discourses. This idea of 'modern-day' heroes is also explicitly promoted in textbooks and somewhat distorts the notion of heroism in normal conventions. The problem is partly rooted on how citizenship education

programs of post-independence governments are often reduced to political sloganeering (e.g. the Filipino First policy of the Garcia presidency and New Society by the Marcoses) as briefly mentioned in section 4.0 earlier. Some of these these curricular programs were retained as part of the ‘personal branding’ of the sitting president, only to be abandoned by his successor. To a certain degree this is symptomatic of the ‘neosultanistic’ behavior of most Filipino leaders as discussed in the previous section.

Aside from correlating the pervading political culture and the role of education in perpetuating it, how can this thesis be located in existing Filipino national identity research? Existing studies identify short-lived beginnings of early nationalist tradition, especially of the nascent Filipino nation at the turn of the 20th century (cf. San Juan 2000 2009). Narratives point to lost opportunities in forging a Filipino national identity or at the very least a strong post-independence nationalist consciousness. One such analysis is on the origins of Filipino nationalism and the idea of the Filipino nation as a construct, as an ‘imagined community.’ This is drawn mainly from the seminal work of Benedict Anderson (1991) on the origins and spread of nationalism, with the Philippines as one of his primary examples. Anderson traces the beginnings of ‘Filipino nationalism’ to the literary canons produced by the ‘*ilustrados*’ (led by Jose Rizal)-who were European educated, cosmopolitan polyglots and renaissance men. The downside of the ‘nationalist’ imaginations mirrored in their novels and propaganda materials is that most were written in in Spanish, thereby limiting their reach to the masses. Thus, Anderson’s (1983) thesis that print capitalism was a purveyor of nationalism in the Philippines and elsewhere was valid over a certain period of time. In the case of the Philippines, the American occupation of the islands curtailed the expansion of Spanish-language nationalist literature.

The opportunity to continue the ‘nationalist’ literary tradition initiated by Rizal’s group was also eventually lost due to the imposition (and early adoption) of English as the ‘common language’ of colonial state under the Americans. The imposition of English cut off subsequent generations from the mostly Spanish-language literary output of pioneering Filipino nationalists, that might otherwise have served as possible sources for ‘narrating the nation.’

The present day production, distribution and mandated ‘consumption’ of school textbooks plausibly fit into Anderson’s assertion on the critical role of the mass consumption of nationalist writings.²⁷ But a major consideration is the source and sponsorship of ‘official nationalism’ that goes into the content, which in the case of the Philippines is very fluid, depending on the elite faction who wields the most power at a given period. The findings of this study support this argument especially during the Marcos regime, when textbooks were used as a propaganda tool by the regime. Another stark example is the powerful Catholic Church²⁸, an equally

²⁷ This is beyond the coverage of this study but an interesting angle worth investigating especially by other scholars with newfound interest on Philippine text textbooks like the Brunei-based Filipino historian Rommel Curaming which recently published a textual analysis of selected history textbooks published from the 1960s (cf. Curaming 2017).

²⁸ Catholicism can be equated to nationalism in some societies like Catholic Ireland and Poland.

powerful institution in Filipino society, and its aggressive stance against the mandatory study of Jose Rizal and his nationalist writings at all levels of education.

Other narratives (cf. Mendez and Jocano 1991; Arcilla 2017) highlight how the Filipino 'nation' has patchy or non-existent links to ancient civilizations (thus no monumental cultural artifacts like Indonesia or Cambodia) and limited 'high culture' from which to derive national myths, rituals and other narratives deemed essential in forging a 'national 'identity.' But before colonization, tribal groups scattered across the archipelago had their own customary laws and traditions, musical and artistic creations and extensive trading relations with neighboring nation-states. Many of these 'indigenous cultures' were lost or destroyed after four centuries years of Spanish and American colonization, mainly due to the conscious effort to erase pre-Hispanic culture and traditions (including ancient literary traditions).²⁹ Other scholars argue that pre-Hispanic Philippines was further disadvantaged by its archipelagic features, extreme linguistic diversity, and the limited opportunity for a 'central' nation-state to emerge and unite the many tribal groups (Ileto 2017). When the Americans bought the islands from Spain in 1898, they found this problematic, especially in implementing their policy of 'benevolent assimilation.' According to Ileto (2017), the American commissioners tried reading up extensively on British Malaya hoping to find guidance on how to run their similar tropical colony, but the existing literature at that time proved next to useless to them. They found that, with few exceptions, the Philippines had no sultans, no "hereditary chieftains or rulers," no "established sovereign to whom the people owed and recognized allegiance" (Ileto 2017:246). With Spanish sovereignty now gone, there appeared to be "no constituted authorities, no natural leaders, who (could) speak for the inhabitants of the archipelago" (ibid).

Another enduring theme in debates on Filipino nationalism is the negative effect of the continuing neocolonial relationship with the US. Aside from the economic and political spheres, the shadow of the US looms large even over attempts to weave a 'nationalist narrative' for the Filipino nation. For one, there is that 'active participation' of American scholars in 'inventing' national myths (e.g. Rizal as an American-sponsored hero) or 'negating' Filipino heroes (c.f. Glenn May's 1996 aggressive 'scholarship' against Andres Bonifacio). Worse, there has been only a small or weak cadre of Filipino scholars capable of mounting a sustained 'counter engagement' against these American (and pro-American Filipino) scholars, or of defending the nationalist historiography engendered by few scholars from the 1960s to the 1970s. Moreover, prominent Filipino scholars especially during the Cold War period tend to equate 'Filipino nationalism' to 'anti-American/US imperialism,' which also makes some of their writings dated if used in contemporary issues. Meanwhile, the Filipino state tended to 'label' and equates discourses of 'nationalism' to 'communism' especially at the height of the Marcos dictatorship.

As of this writing, mainstream and alternative discourses on Filipino nationalism and national identity are continuously being woven. The themes explored above are limited and the selection process is possibly tainted by my own biases. However what is evident is the glaring absence of a coherent 'national story'

²⁹ This is a similar approach adopted by the Spanish in Latin America (e.g. Mexico, Peru).

of the Filipino people and how the idea of a nation is constructed (or imagined). For example, literary canons from which ancient nations derive their national myths, traditions and symbolisms are still widely dispersed amongst many ethno-linguistic groups. Unending debates about the use of Filipino (the Tagalog-based national language) still hinder efforts to curate such a canon using a 'common' (national) language. This topic is explored in Chapters 2, 3 and 5 of the thesis as one of the most vexing educational issues for decades now. Other angles of the national identity debate in the educational setting especially in history and citizenship education are tackled across Chapters 4, 5 and 6.

Given this larger historical backdrop and state of the art of the themes covered in this thesis, what evidence does this thesis offer in proposing causality between education and the phenomenon of labour migration? The next section briefly summarizes how I curated the mostly stand alone book chapters and journal articles I have written since the beginning of 2012. These chapters deliberate on which pieces of historical evidence analyzed could establish links between the schooling experience of Filipinos and their overly positive mindset towards the idea of emigration.

6. 0 Organization of this thesis

This section explains the structure of this thesis compendium and the particular focus of the chapters. Here I elaborate the reasons why these chapters (stand-alone articles and book chapters) focus on particular themes or problems, and how they relate to the broader research questions or problems/issues outlined above (also guided by the the analytical framework illustrated in Figure 1).

The origins of the modern Philippine state characterized as 'weak' (Myrdal 1968), 'anti-developmental' (Bello 2009), patrimonial (Hutchcroft 1991) and the epitome of what Anderson (1988) characterizes as '*cacique* democracy' is discussed in Chapter 2. The chapter also traces the emergence of the Philippines as a 'labour-brokerage state.' The study is limited to library research and as mentioned above is a comparative analysis of the Philippines and Singapore, Hong Kong, Taiwan and South Korea, collectively referred to as the East Asian "tigers." The study's comparative arguments hinge on the political-economic contexts and dynamics of development of the East Asian tigers and the Philippines and how these are mirrored in their respective education systems. Socio-cultural influences that found their way through the economic, political and educational policies are also covered. The broad connections of education to the development discourse are distilled from available literature relating to the last five decades. The 2012 Compare journal article on the Philippine phenomenon of underdevelopment provides the context necessary to guide the readers toward understanding the impetus and motivation for the whole study.

The following two chapters -3 and 4 provide a more detailed analysis of the colonial origins and post-independence metamorphosis of the Filipino nation-state. These discuss the underlying political, socio-cultural and economic conditions that eventually contributed to the growing export of Filipino labour from the 1970s. These chapters also analyze the evolution of a highly stratified education system that

led to the entrenchment of profound social inequality, which combined with state weakness and elite rent seeking, contributed to prolonged economic stagnation. In this context, it has suited powerful vested interests to direct popular aspirations outwards, towards the international labour market, using migration as a 'safety valve' to minimize domestic political discontent as further elaborated in these two chapters. These chapters draw upon and synthesize a wide range of existing literature, as well as archival materials, including textbooks, manuals and government plans.

Chapters 5 and 6 discuss how the structure and content of schooling in the Philippines have remained fragmented and weakly oriented towards promoting a shared consciousness of nationhood, even after gaining independence. I argue that the relative ease with which early migration-related programs were implemented (and maintained to this day) is symptomatic of this weak Filipino 'national' identity. Teasing out the evolution of history and civics education in the last century of public schooling, these 2 chapters briefly trace the historical development of 'national identity' formation, identifying as nodal points: 1) the short-lived Philippines revolution of 1896 (Malolos Republic) which had a strong anti-colonial bias; 2) the introduction of the American colonial education system in the early 1900s which tended to develop national identity "of a variety inoffensive to the colonial master" (Wurfel 1988:24); 3) the sharpening of a national identity with a strong anti-colonial strain in the 1940s up to the 1950s, to be taken up again in the 1970s (only to be appropriated by the Marcos regime's New Society experiment) and 4) the widening of nationalism as both a mass and an elite phenomenon in the 1980s (a contested arena between Marcos and multi-sectoral groups opposed to his dictatorial rule and acquiescence to the US and international creditors).

The nationalist resurgence starting from the early 1970s was characterized by attempts of various groups, operating openly or underground, to comprehensively define the Philippine situation to include not only the neo-colonial character of society, but also the backwardness and dependence of its economy, the corruption and inefficiency of its bureaucracy and the increasing fascism of the Marcos administration (cf. De Dios et al. 1989). But most of these nationalist struggles against Marcos were played out in the so-called parliament of the streets and found form in cinema, visual arts, theatre productions and songs. The Marcos regime had virtual monopoly of the school system, except for private Catholic schools and universities.

These two chapters also historicize the origins of the labour export strategy, noting how since the 1970s, state sponsorship of labour migration accelerated the exodus of professionals and highly skilled workers. After Marcos, narratives hailing Overseas Filipino Workers (OFWs) as 'modern day heroes', and sports stars or artists who have 'made it' in America or elsewhere as models of Filipino success, became increasingly prominent in school texts. This has served to reinforce the message that Filipino patriotism is demonstrated by seeking fame and fortune abroad. The status of English as the main medium of instruction has meanwhile been maintained, ostensibly to ensure the employability of Filipinos overseas. Documenting these changes in key curricular areas – History, Civics and Language – using archival and published sources, here I supply material evidence. These affirm

the historical role of the school curriculum in (1) contributing, plausibly, both to a relatively weak or loose sense of 'Filipino' identity, and (2) fueling popular aspirations to live and work abroad.

The case of the *Japayukis* in Chapter 7 illustrates the hypocritical posturing of the state in relation to this unique group of Filipino migrant workers. Whilst official discourse promotes labour migration as heroic and patriotic, the state is facilitating placement of Filipino women for 'entertainment work,' which some quarters of (Philippines and even Japanese) society view as tantamount to human trafficking for sex work. The role of the technical-vocational education branch in the *Japayuki* skills certification scandal highlighted in this chapter also validates earlier findings in Chapter 2 on the lack of government control over the national education system as a whole. This lack of regulation is particularly true in the highly privatized technical-vocational and higher education sectors.

So what does all this work of tracking of historical evidence and teasing out links in education and migration boil down to? What new insights does my research bring forward to the highly established labour migration research field? What critical perspectives on Philippine education *vis-a-vis* the labour export program are brought to the surface by this study? The last section of this introductory chapter offers some answers to these questions. It also highlights the implications of the research findings on various institutions and actors, from both the government and private sectors, involved in the education and labour migration business.

7.0 Significance and implications of the study

This study was pursued with the general objective of examining a set of hypotheses about the function of education in the political socialization of Filipinos towards migration. It seeks to illuminate connections between identity discourse and the predisposition towards labour migration or permanent emigration.³⁰ Since this study is more literature-based, future research on this topic should critique or elaborate arguments presented here through the use of methods such as ethnography, participant-observation and biographical research (life history writing) of migrant Filipinos. There is a need for studies of migration and other social phenomena to 'bridge' the divide between social scientists and educationalists in the Philippines – a problem which the psychologist (and educationist) Allan Bernardo has highlighted (2008). The corpus of literature on Philippine education conducted from the perspective of critical social science, as distinct from technical studies of educational 'effectiveness', remains exceptionally thin. As Bernardo argues, this chasm between two research cultures is something that Filipino 'social scientists have sidestepped, tiptoed around, or simply failed to deal with.' (2008:5). In contributing to a broader scholarly debate about the relationship between education, nationalism, transnationalism and citizenship (in the context of global mobility), the present study therefore maps out an agenda for future research in an important area that has been largely neglected by Filipino researchers.

³⁰ Ideally these hypotheses should be tested through surveys or ethnographic study of these migrants identity consciousness and how it might be related to their education experience.

Whilst this study may be recognized as a significant contribution to the field of education studies in the Philippines in general, it can be associated more narrowly with sociology or the politics of education as highlighted above. Much previous work in this field tends to treat education just as a 'field or locus' of the study of Philippine society at-large, and usually embedded in the more popular and well-researched fields of anthropology, sociology, political science (governance) and even economics. But more importantly, it is hoped that this study will prompt more conversations over the role of education in channeling (or moderating) debates on national identity and nationalist consciousness, especially in this global era of 'collective narcissism' (Jarrett 2017; Singal 2018),³¹ associated with the rise of populism in many societies. This 'national' narcissism is characterized by an amplified 'personal' affiliation to the nation, which often triggers hostile reactions to external criticism directed to the 'motherland.' It can elicit a strong sense of entitlement, revealed in an expectation that other countries or the international community will recognize or even defer to the motherland's authority. Derived from a dominant personality trait common in individualistic societies, it has been cited as the cause of political upheaval across the world (Singal 2018). Behaviors related to this phenomenon have been on the rise even in the Philippines. 'Nationalist sentiments' among (young) Filipinos has been aroused by criticism from foreign governments and organizations like the UN bodies of the Duterte administration's human rights violations (cf. Curato 2017). These are mostly expressed via social media, a free platform beyond the control of the state and hosted by foreign entities. This is a relatively new phenomenon that will be of interest to sociologists and educationists trying to understand what shapes Filipino 'identity' nowadays beyond the traditional influence of the family, school, church and community.

This thesis has uncovered a wealth of underutilized archival materials on Philippine education such as curricula, syllabi, textbooks and manuals developed and used in schools nationwide since the colonial era. In the process of writing this thesis, I was struck by the deplorable state of these historical resources stored in the country's university and ministry archives, which languish in varying degrees of decay and neglect. In its modest way, this thesis also contributes to the relatively scant body of work narrating the country's education history. This is another field of study into which very few scholars (particularly Filipinos) venture. A key finding of the textbook analysis conducted in Chapters 3-6 consists of the evidence for the overwhelmingly positive portrayal in Filipino school texts of foreign 'Others', labour migration, and emigration in general.³² Textbook research has yet to garner much

³¹ This is fully elucidated in the journal article, *We Made History: Citizens of 35 Countries Overestimate Their Nation's Role in World History* (Zaromb et al. 2017). Students from the University of the Philippines-Diliman were surveyed for this study wherein the goal was to better understand students' potential feelings of "collective narcissism" or "the phenomenon of people showing excessive pride in one's own group". Interestingly, in a survey of 35 countries, Filipino students registered a relatively higher degree of association of their country's 'contribution' to world history and their national identity (cf. Zaromb et al. 2017), along with 8 other countries Australia, Belgium, Hungary, Indonesia, Italy, Russia, Taiwan, and Tunisia. This nevertheless warrants a more nuanced interpretation, including a review of datasets used and the survey parameters itself.

³² Although Doronila's (1989) pioneering study is still the 'standard' in textbook studies, she did not tease out the fine details of Marcos-era textbooks. She was more concerned with the totality of the 'learning experience' - factoring in teacher experience and consciousness, external variables like political environment,

attention in Philippine historiography and education studies, and very few scholars have made forays into this area (aside from the classic studies by Doronila and the Constantino couple; see Iletto 2017; Mulder 2000; Curaming 2017 for more recent attempts). In the meantime, findings generated by textbook reviews conducted for this thesis still echo the results of the 2000 UNESCO and Philippine Social Science Council study on social studies textbooks and indirectly, the social studies curriculum (which covers history and civics education). In Bernardo's (2008) synthesis of the review study, he highlighted how 'textbooks and the curriculum lacked any semblance of a coherent discursive framework to connect and unify the various curricular elements' (p.15). Unfortunately, this finding still rings true two decades later, as this thesis makes clear.

This study is potentially of significant interest and usefulness to scholars and practitioners in the education sector, at all levels and across the public and private sectors. Its historical findings offer perspective and material for critical reflection to those charged with formulating plans, programs and policies, including curriculum planners, textbook developers (writers and evaluators) and publishers, and instructional managers. One area of relevance to this study in which greater critical reflection is urgently needed concerns the role of the US as the 'only' model of education reform for the Philippines. It became apparent in the four years of doing this study that the US and the Philippines share the same attitude towards 'comparative' studies. As Cummings (1999) notes, there has been an assumption that the US was the lead society in the world and had little to learn from other societies. The pervading view then was that all societies would 'westernize' (or modernize), converging around a set of institutional arrangements determined by the most advanced or lead society, the United States (Cummings, 1999 p. 417). This study has clearly demonstrated the limitations of the unilinear, US-obsessed model of educational development that the Philippines adopted (Fagerlind and Saha 1989). The 'self-referential' attitude of the US (Larsen 2007; Steiner-Khamsi 2004) in terms of education policy-making seems to find resonance amongst Filipinos as illustrated in Chapter 2 (and partly in Chapter 7) of this thesis, and this helps to explain the stark divergence of policy in the Philippines from that in neighboring East Asian countries. The lack of studies comparing the trajectory of education development of the country with its East Asian neighbors is symptomatic of the same phenomenon. The 'point of reference' for education programs and policy reforms has been (and still is) the US ³³ This is another aspect of comparative education research in the Philippines for future consideration.

Finally, to some extent this study also debunks the oft taken-for-granted assumption that education is the master determinant of 'social change' (Coleman 1956). In the Philippine case, the opposite would appear to have been the case. What was once Southeast Asia's most highly literate and democratic society has degenerated into its least egalitarian (see Chapter 2). A concern that informs this study as a whole involves the relationship between education and this degeneration.

regime's propaganda in popular media which she argued were contributory to the socialization process of the Filipino pupils.

³³ Even the writings of the late Education Minister and Philippines higher education scholar Andrew Gonzalez tend to have this self-referentiality or exceptionalist undertones having trained in the US and being at the helm of the Catholic (and US-patterned) De La Salle University System.

Factors that have been blamed for this include the country's dysfunctional democracy, neocolonialism, and a semi-feudal agrarian system, but set against that gloomy backdrop the record of educational development and labour migration stand out as rare bright spots. Labour migration has long been credited as the major plank propping up the national economy and the lifeline of most Filipino families, and this study shows how this has been intrinsically linked to aspects of education, and specifically the school curriculum. It shows that Filipinos' initiation to the 'culture of migration' begins at the onset of their schooling experience. Promoted in official education discourses (in textbooks and possibly in other media) as a form of 'heroism,' labour migration is now indelibly ingrained in the consciousness of young Filipinos. This early exposure reinforces that idea that the willingness to leave home for the sake of one's family (and country) is a marker of a model citizen. But the extent to which this predisposition to emigrate is more broadly indicative of a weak 'national identity,' as this study argues, requires further investigation. It certainly seems that Filipino schooling differs in its approach to inculcating national identity from the more homogenizing and totalizing curricular prevalent across much of East Asia. But has this rendered Filipinos less 'patriotic'? Newly fashionable discourses of 'global citizenship' celebrate migrant Filipino workers (and emigrant citizens) for their exemplary adaptability to their adopted homelands, but – notwithstanding my analysis here and in subsequent chapters of the school curriculum – are such ideas necessarily exclusive of, or antagonistic to, an abiding sense of Filipino nationalism at *grassroots* level? Or do they reflect or express the peculiarly 'international' ingredients of a notion of 'Filipino-ness' that is nonetheless coherent and strongly held? These are questions for further reflection and research.

Chapter 2

The Philippines, the East Asian ‘developmental states’ and education: a comparative analysis of why the Philippines failed to develop³⁴

Abstract:

As I note in the introductory chapter, this thesis was inspired by an earlier inquiry on the phenomenon of underdevelopment besetting the country in the last five decades. The key findings of that inquiry are reviewed here in Chapter 2, where analysis of the post-war development of the Philippines, focusing on the role that education played, is contrasted with the record of the East Asian Tigers (South Korea, Taiwan, Hong Kong and Singapore). This account illustrates how the Philippines was distinctive in terms of the state’s failure to exercise strong central control, especially over the education system, with serious implications for economic development and national unity. It notes that the status quo, which has its origins in a plantation economy, prevailed, thus maintaining and reinforcing a perpetual state of inequality and impoverished democracy.

1. 0 Introduction

The Philippines is a puzzle because in the 1960s it was viewed as the Asian country most likely to develop rapidly (Landé 1965; Lucas 1993; Martin 1993), but as Table 1 shows its economy failed to take off, in marked contrast to its East Asian neighbors. By 2000, the Philippines even lagged behind the second phase of rapidly developing local economies such as Thailand and Indonesia – whose per capita GDP in the 1960s was only one-third of that in the Philippines (Terry 2002; Yap and Balboa 2008). The early optimism about the country’s potential was based on both the relatively impoverished state of the post-war economies of its neighbors and the nature of its own educational and political systems.

In the 1960s, the education system was considered one of the most developed in Asia (Cardozier 1984; Landé 1965; Swinerton 1991). As shown in Table 2, the country had one of the highest rates of adult literacy, basic education completion, secondary education and higher education participation levels in the region. Thus, Landé (1965, 325) optimistically declared that ‘farsighted educational policies adopted by American officialdom prepared the way for rapid industrial growth at a later time by helping to create a labour force equipped by training and outlook to man modern industrial establishments’. The failure of the country to achieve rapid economic growth led Filipino scholars to pose the question, ‘*If we’re so smart, why aren’t we rich?*’ (de Dios et al. 1995).

³⁴ An earlier version of this chapter was published in 2012 with Prof. Paul Morris (UCL-IOE, London) in *Compare: A Journal of Comparative and International Education*, 42, pp. 461-484.

The Philippine revolution in 1898 gave it independence from Spain. Immediately thereafter, the process of state formation commenced with the establishment of Aguinaldo's revolutionary government and the Malolos Congress, but was aborted a year later by the American occupation, which lasted until 1946. The USA paid the Spanish \$20 million for the islands in 1899. Nonetheless, the US introduced electoral democracy through the first election of the lower house of a bicameral national legislature in 1907 (Nelson 2007), and a judicial/legal system patterned after the American model. This made it Asia's first democracy. Myrdal argued that the political conditions in the Philippines augured well:

Representative government has a long history in the Philippines and would seem to be firmly established; the country has had the experience, rare in the region, of two changes in national leadership via the ballot. Under these circumstances, it would seem possible that politics could gain a broader democratic base by more organized participation on the part of the low-income groups. This could well lead to the breakup of the present political power structure and the initiation of large-scale reforms, primarily those of an agrarian nature. (Myrdal 1968, 390)

Table 3. Key indicators of selected Asian economies

	Population growth rate			Per capita GDP (1990 international Geary-Khamis dollars)				GDP growth rate		
	1913–1950			1950				1913–1950		
	0	1950–1973	1973–1998	1950	1973	1990	2001	50	1950–1973	1973–1998
Hong Kong	4.21	2.79	1.87	2218	5695	17541	21259	–	8.13	6.21
Malaysia	2.01	2.64	2.35	1559	2079	5132	7756	3.54	4.88	6.61
Philippines	2.22	3.04	2.48	1070	1764	2224	2412	2.23	5.79	3.08
Singapore	3.16	3.88	1.88	2219	4439	14365	21011	4.71	7.93	7.45
South Korea	0.71	2.16	1.25	770	1954	8704	14673	0.30	8.13	7.31
Taiwan	2.24	2.96	1.39	924	2980	9886	16214	2.87	9.81	6.77
Thailand	2.28	3.08	1.61	817	1694	4629	6383	2.23	6.87	6.59

Source: Maddison (2006).

Table 4. Education data of selected Asian economies

	Adult literacy rate			Primary level enrolment (gross ratio)				Secondary level enrolment (gross ratio)				Tertiary level enrolment (gross ratio)			
	1980	1990	2003	1965	1975	1985	2001–	1965	1975	1985	2001–	1965	1975	1985	2001–
							2009				2009				2009
Hong Kong		89.7 ^a	93.5 ^b	103	123	105	101	29	50	71	83	5.4	10.4	13.3	34.3
Malaysia	69.52	80.7	88.7	92	94	101	98	28	45	53	69	1.9		5.9	29.7
Philippines	83.32	91.7	92.6	113	105	107	108	41	56	64	81	18.8	20.1	24.9	27.8
Singapore	82.91	88.8	92.5	105	110	108		45	53	59		9.9	9.2	13.6	
South Korea		95.9 ^a	97.9 ^b	101	109	97	104	35	59	92	96	6.2	9.8	34.0	96.1
Taiwan					100 ^c	99	100 ^d		74 ^c	90	99 ^d		15.4 ^c	20.8	77.4 ^d
Thailand	87.98	92.4	92.6	78	84	96		14	25	30		1.5	3.5	19.0	

Sources: Orbeta (2003); UNDP - Human Development Reports 2003, 2004, 2005, 2010; Taiwan Ministry of Education online database (for all Tai-wan data)

^a1990 data, source: UNDP - Human Development Report 2004;

^b2001 data, source: UNDP - Human Development Report 2003;

^c1976 data, source: Taiwan Ministry of Education online database;

^ddata average 2001–09 (authors' computation), source: Taiwan Ministry of Education online database.

These predictions did not materialize. Why did the Philippines miss out on the Asian economic boom(s)? There is a plethora of studies analyzing the success of the ‘Tiger’ economies, but a relative dearth of scholarly work comparing the Philippines with its neighbors and analyzing its failure to develop. This article provides the first in-depth comparative analysis of the interface between education and the development of the Philippines with that in the East Asian Tigers. Our focus is on the economic dimension of development because, as indicated above, on many of the measures of human development and welfare (e.g. life expectancy, educational access and literacy) the Philippines was a leader in the region. Its failure was that it was unable to harness those conditions to improve the economic wellbeing of all of its citizens. We argue, following the extensive literature (Wade 1990; Green et al. 2007) which highlights the critical role of the state in the rapid development of the Tiger Economies (rather than the influence of free market forces) that the root of the problem lay in the weakness of the state. Specifically we suggest that despite its democratic political system and high levels of educational access, the state was captured by a range of self-interested groups and failed to prioritize economic development or the national interest. This was manifested in the education system, on which we focus, where the states policies were incoherent, not implemented or subject to reversal.

2.0 The East Asian Tigers

Prior to focusing on the role of education we briefly review the range of explanations that have been advanced for the success of the Tiger Economies. Whilst education policies have been seen to be critical, they have generally been viewed as an element within a broader economic and political strategy pursued by the state. Three, often interconnected, strands of explanation are summarized below, which relate to: the historical, geo-political and cultural conditions; the economic; and the political dimensions.

It has been argued that the colonial legacies of the Tigers created conditions supportive of their later success (Booth 2005; Litonjua 1994). Singapore and Hong Kong benefitted from inheriting an infrastructure and system of governance that was relatively efficient and allowed the state to exercise its authority. Taiwan was under Japanese rule for 50years (1895–1945), and the undivided Korea for 35years (1910–1945).

Japan has been ascribed a critical role in the growth of the agricultural economies of Taiwan and South Korea, especially in the creation of an infrastructure that facilitated the state’s capacity to control and govern. These colonies were transformed into extensions of the Japanese agricultural sector (Litonjua 1994) to feed the growing needs of imperial Japan, ushering in an era of food security and mutual cooperation even after independence in 1945 (Angeles 1992). Likewise, Japan would turn to South Korea and Taiwan for cheap labour when it began its industrialization at the start of the twentieth century.

These post-colonial relations also facilitated the rise of the indigenous entrepreneurial class, who were sustained later by state-led and centralized approaches to education planning and management. Latterly, as the Tigers began to develop, they turned to Japan for strategies and policies to ‘borrow’ in their quest to

achieve rapid industrialization and growth. Accordingly, Kasahara (2004) describes the Tigers' emulation of Japan's approach as the 'flying geese model' of development.

East Asian post-war and post colonial history was defined by the region's new geopolitics, in which a mixture of regional tensions and the impact of the Cold War defined the West's relations with these states as bulwarks against the spread of Communism. Supported by aid, trade and technology transfer, these regimes flourished amidst strained relationships with neighboring states (Morris and Sweeting 1995 1998). South Korea remains technically at war with the communist North after an armistice instead of a peace treaty was signed in 1953 (Abe 2006). Singapore was expelled from the Federation of Malaysia after declaring independence in 1965 and continued to view Malaysia as a threat to its sovereignty for a while (ibid.). China considers Taiwan as a renegade province after the nationalist Kuomintang fled there. Until the 1980s the government considered itself the legitimate government of the mainland. Hong Kong, which until 1997 was a British colony, defined itself by reference to its distinctiveness from the Communist mainland.

The cultural explanation has argued that the Tigers share a Confucian cultural heritage, which values and inculcates attributes, such as diligence, filial piety and loyalty, and has been conducive to both ensuring economic success and support for, or at least a willingness to sublimate, personal in favor of communal interests and an acceptance of the leadership of the benevolent state (Cummings 1996; Tai et al. 1989; Tu et al. 1996). The argument echoes that of Weber, that the 'Protestant ethic', which values diligence and abstinence, facilitated the industrialization and growth of countries such as the UK and Germany. Weber also argued that China's failure to develop at that time was attributable to the effects of Confucianism.

The 1997 Asian economic crisis resulted in an appraisal of some of the claims for the success of the Tiger Economies, especially with regard to their shared traits and the virtues of 'Confucian societies'. For example, Kang (2003) points out that the much valued 'strong family ties' led to cronyism and corruption in Korean society. Abe (2006), using basic demographic data, argues against the classification of East Asian nations as 'Confucian States' or 'Confucian Heritage Cultures.' Abe notes that Taoism rather than Confucianism is prevalent in Taiwanese society; 50% of Koreans believe in Christianity; and Singapore is a multi-ethnic city-state. Whilst such explanations may be valid to explain the situation in a country, they have limited generalizability as they can neither explain the more recent economic growth of countries such as Malaysia or Thailand, nor can they explain why, given these long-standing cultural traits, economic growth occurred when it did.

There are many strands of analysis in the economic dimension of the Tigers' success story, but there is a common recognition of the importance of the outward-oriented economic policies pursued and their capacity to respond quickly to changing economic circumstances (World Bank 1993). However, that focus on exports was preceded by a range of reforms, which created the conditions that allowed the economies to industrialize and focus on exports. Land reforms and agricultural productivity improvements in South Korea and Taiwan in the 1950s were followed by import substitution policies from the late 1950s to the early 1960s

until their transition to export-oriented manufacturing during the middle and latter part of the 1960s.

Except for Hong Kong, the East Asian economies then shifted to industrial production through refining, chemicals, steel production and later shipbuilding in the late 1960s to early 1970s. Intensified competition in the late 1970s and early 1980s in the production of low-cost manufactured goods threatened their competitiveness as they raced towards more skills-intensive, higher-end manufacture of electronic goods and components, including computer chips and personal computers. By the 1990s the emergence of China as a manufacturing economy led to a transition to services and research-based areas of production, such as biotechnology, and (in the case of Singapore) as a regional service hub for transnational companies.

The 1993 World Bank report found no single model to explain how the East Asian economies had grown rapidly with low levels of income inequality. They identified as a common feature pragmatism and flexibility in policy-making. The high degrees of risk-taking and adaptability were attributed to bureaucracies insulated from political interference (Abe 2006). The report identifies broad categories of policies that created the East Asian miracle (World Bank 1993: 82–6). First, measures to ensure macroeconomic stability were introduced, by controlling inflation for example. Second, the government intervened when necessary, such as setting the interest rates in the capital markets and providing financial support and tariff protection for weak industries. Third, investment in both human and physical capital was prioritized. Fourth, policies converged towards openness to international trade. Finally, mechanisms and processes that encouraged private investment and competition were institutionalized. The report emphasizes that the East Asian bureaucracies got effective results through these policies by ensuring positive interaction and reinforcing feedbacks generated over a sustained period of time. A number of authors (Chang 2002; Wade 1990) have argued that this depiction overstates the role of market forces and underestimates the powerful role played by the state.

These disparate explanations for the success of the Tigers outlined above are effectively integrated in their depiction as 'Developmental States' (Donner et al. 2005; Woo-Cumings 1999). The term developmental state was first used by Johnson (1982) to describe Japan's post-war economic growth and at its core involves a strong government prioritizing economic growth as the overarching goal and pursuing a coherent strategy to achieve its goals through an efficient bureaucracy. The state's primary source of legitimacy was economic and individual rights were sometimes sacrificed to achieve the 'common good'. Levels of income inequality were relatively low whilst access to the fruits of economic growth and social mobility were largely meritocratic and primarily determined by school examination results. Myrdal (1968) outlines the economic dimension of what was the precursor of the developmental states, or as the World Bank terms it 'soft authoritarianism', when he refers to 'strong states' which used economic planning and coordinated large-scale state intervention to anticipate the market rather than just to provide infrastructure.

Similarly, Castells (1992, 2000) argues that the geo-political crises and on-going external threats experienced early in their industrialization led these countries to adopt developmentalism, a political-economic ideology and strategy characterized by strong state intervention. In effect, the government operated on a quasi war footing, with the economy as the primary instrument of national defense. The authoritarian political structure was reinforced by the Confucian tradition that promotes respect for authority and a deep sense of morality and civic duties. Moreover, Confucian societies have been attributed with putting a high premium on scholarship and public service, borne out of prestige and honor attributed to service in royal and imperial courts in ancient times.

In sum, the cornerstone of the East Asian Tigers' success was their economic transition from the 1960s to the 1990s, from import substitution to export industries. But the success of economic and social policies was anchored in the interventionist role of the state and it was not Adam Smith's 'invisible hand' of the market at work, but the 'iron hands' of the state, especially in Taiwan, Singapore and South Korea.

Education was a key element in the strategies employed by the developmental state as it was harnessed to provide the skills the economy required and to create the social cohesion, sense of national identity and patriotism which the single-minded quest for economic advancement required. Sung (2006) argues that the states policies, especially in Singapore, created 'developmental workers' whose commitment to upgrading their skills and productivity was vital in supporting economic growth. The national education systems of the Tigers displayed distinctive features, especially in the 1960s and 70s when economic development was in its infancy. There was very strong central state control of schooling. Common curricula were made available to pupils and their access to schooling was based on their academic ability accessed via highly competitive examination systems. School curricula were uniform and designed to develop both the skills needed by the economy and to inculcate attitudes and values that were deemed to support social cohesion and loyalty to the state (Lall and Vickers 2009). This state control was also reflected in strong curricular policies on the medium of instruction, which were used, with the exception of Hong Kong, to put in place national unifying languages.

Finally, education has been very much at the center of national economic planning of the East Asian states (Cummings 1995). The growth and expansion of the different levels of the education system was sequential, with mass primary schooling being achieved before the expansion of secondary schooling, and lastly of higher education (Morris and Sweeting 1995; Morris 1996). The state encouraged private providers to meet the demand for schooling, especially at the early childhood and higher education levels, but in parallel exercised strong regulatory control of the sector. These periods of school expansion were almost synchronized with the periodic re-engineering of their economies. In addition the system was perceived as fair and parents busied themselves in supporting and encouraging their children to work hard and maximize their examination results. More recently, as these countries have faced fresh challenges from a new phase of rapidly emerging nations, especially China, and the Asian economic crisis, their governments have engaged in wholesale reforms of the education systems, with the goal of ensuring their future economic competitiveness. Examples are the 'Learning to Learn' reform introduced in Hong

Kong in 2000 and the 'Teach Less Learn More' reform introduced in Singapore in 2004.

At the higher education level, science and technology courses were prioritized (Cummings 1995). The strong bureaucracies of the Tigers facilitated a progressive budgetary support for education, coordinated manpower forecasting for education planning, and government–industry–academe partnerships.

The above portrayal has provided a brief overview of the various factors which have been identified as contributing to the Tigers' successful economic development. A number of caveats are necessary to minimize the risks of ignoring the negative aspects of developmental states and generalizing across nations. First, it is important to recognize that the strong and authoritarian role of the developmental states and their single-minded pursuit of economic development were not without costs. There were negative consequences for other aspects of development, especially in the early period of economic take off. Human rights, especially those of individuals and minority communities, were often trampled on in pursuit of the states vision of the national interest; democracy, freedom of speech and minority languages were suppressed; and schools specifically were used to promote the states messages which, *inter alia*, discouraged independent or critical thinking and taught forms of ethno-nationalism which came close to being xenophobic. Second, whilst there were commonalities in the approaches of the Tiger economies which have been highlighted above, there were also significant variations. Specifically, the case of Hong Kong does not fit comfortably as a classic developmental state as the colonial government was tolerated by the population, did not attempt to promote a national identity, faced a free press and tolerated freedom of speech, and had difficulties implementing policies which faced substantial opposition (Morris and Adamson 2010). However, as with the other Tigers, the Hong Kong government exerted strong central control of schooling to ensure it was not used for subversive purposes. More importantly, the government's source of legitimacy was, to an even greater degree than in the other Asian Tigers, based wholly on its capacity to ensure the growth of both the economy and the community's living standards. Further, as a society whose population were mainly economic and political refugees from the mainland, or their descendants, a form of developmental psyche emerged in which economic development was prioritized by the community. Finally, the experience over the last 15 years of the first developmental state, namely Japan, which has experienced economic stagnation for over a decade, is a salutary reminder that the patterns of economic growth achieved in the past are no guarantee of future performance.

3.0 The Philippines

Below we provide a brief analysis of the overarching economic and political conditions that have defined the country's development in the post-war period. Subsequently, we focus on the education system. The discussion covers: the restored American-sponsored Commonwealth (1944–46); the four elected governments (including Marcos' first term) of what is termed the Third Philippine Republic (1948–1969); the Marcos regime's New Society (1969–1986); and Aquino's revolutionary government in 1986 which constituted the Fourth Republic

(1986–1992). To date, the Fifth Philippine Republic (1992–present) has had four elected governments, with the current President Aquino’s term ending in 2016.

During the colonial period (1899–1946), the country was developed as a plantation economy exporting agricultural products (sugar, hemp and tobacco) mainly to the USA. The Americans, who needed the support of the landed elite, reinforced the stratified patterns of land tenure (Litonjua 1994:14) by selling large tracks of Spanish friar estates to wealthy Filipino families, who transformed the sequestered lands into cash crop plantations (Dolan 1993).

Whilst the Americans dismantled the feudal system of land ownership in Taiwan and South Korea in the post-war period, the Philippines feudal structure was consolidated (Angeles 1992; Litonjua 1994). Succeeding governments would attempt to institute land reforms (Bello 2009) but with limited effect. The World Bank (1993) traces the failure of the agrarian program to the ability of powerful groups to capture the state and influence the country’s economic policy to protect their own interests. Additionally, the report highlights the weak nature of the Philippine bureaucracy, whose deference to politicians and other interest groups resulted in an agrarian reform law riddled with loopholes and whose enforcement was nearly impossible.

Aside from reinforcing the status quo in terms of land ownership, the Americans ensured that funds for war reconstruction were tied to disadvantageous economic pre-conditions (Constantino 1978). The 1946 Trade Act defined a relationship which greatly favored the USA. Most controversial was the establishment of quotas on Philippine exports to the US and the ‘parity’ provision that granted US citizens equal economic rights with Filipinos (Constantino and Constantino 1978). These conditions have been viewed as constraining the development of the economy (Bello 2009; Constantino 1978) and emasculating the confidence of local industrialists which affected the overall direction of industrial and enterprise development.

The Philippines’ post-war geopolitics was, as with the rest of East Asia, dominated by the Cold War and its strong relationship with the US, which involved it hosting the biggest US bases in Asia from 1947 until 1993. The country’s ongoing economic, political and military dependency on the US has been viewed as tantamount to neo-colonialism. Although the economy greatly benefited from US aid due to the Military Bases Agreement of 1947 (Constantino and Constantino 1978), a negative balance of trade led to the 1949 economic crisis, which triggered the ‘oligarchic plunder’ of war rehabilitation funds to pay for duty-free imports (de Dios and Hutchcroft 2003:47). The government responded by instituting import and foreign-exchange controls that lasted until the early 1960s (Dolan 1993). This intervention invigorated manufacturing industry in the country. It became the flagship sector of the economy and grew from 10.7% of GDP in 1948 to 17.9% in 1960 (de Dios and Hutchcroft 2003) and was the envy of South East Asia (Bello 2009). Manufacturing output and exports exceeded those of Taiwan and South Korea, but that period was the peak of its economic performance (Krinks 2002).

The oligarchs again seized the opportunities to gain control of licenses, create monopolies and enrich themselves (de Dios and Hutchcroft 2003). The oligarchic

system nurtured what was later referred to as 'crony capitalism' with the ascent of Marcos to power in 1965. Family members and business associates of the 'conjugal dictatorship' (1972–1986) were given monopolies and cartels, which stifled the growth and competitiveness of the Philippines export industries. Thus, the era of import substitution was, as with the plantation economy, dominated by a small oligarchy. The bureaucracy was rendered futile and economic policies were not shaped by the challenges and difficulties of the economy but by narrow interests.

Marcos ruled until 1986 and via martial law from 1972 to 1984. Krinks (2002:2) argues that his regime was the most developmentalist government in Philippine history and the declaration of martial law was necessary to remove political and bureaucratic obstacles to development. In 1972, Marcos sought to emulate the East Asian economic miracle by attempting a transition from import substitution towards export-led industrialization (Litonjua 1994:19). But the global economy was already in a downturn and 'the Philippines was completely unprepared for its sudden entry into a highly competitive world market' (McCoy 1983:142–3). Under martial law the country's development strategies remained incoherent, as 'there was continued promotion of exports, but at the same time continued protection of import substitution firms' (de Dios and Hutchcroft 2003:49) – a majority of which were owned or controlled by Marcos and his wife's cronies and relatives.

Marcos's ambitious development programs (e.g. rapid industrialization, mining, construction and public utilities) were financed through heavy foreign borrowing (Overholt 1986) and relied on state institutions, including the military, to implement them. By the time he was overthrown the government was bankrupt (Balisacan and Hill 2003) and succeeding governments would use 10% of GDP (Boyce 1993) just for servicing the debt. Marcos failed miserably in this experiment as he used the state apparatuses for personal gain.

With the failure to develop the economy, a policy to export labour emerged as an official economic development strategy from 1974. This was intended as a short-term measure to address unemployment problems as export-oriented growth was slowing down (Ruiz 2006). However, it became a permanent policy for subsequent administrations. Today, the number of Filipinos working abroad is approximately 9 million or 10% of the population, one of the biggest diaspora populations in the world contributing almost US\$19 billion (approximately 10–12% of GDP) in 2010 to the economy (Remo 2011).

Thus, the Philippine state, even when run as a dictatorship, was not used as a springboard for economic development (Koike 1988), but rather as a vehicle for patronage. This has been explained by reference to Weber's work by Hutchcroft (1991), who argues that the Philippine state has been a patrimonial state since the introduction of electoral democracy in 1946, where the 'administration is treated as a purely personal affair of the ruler and political power is considered part of his personal property' (415). This 'personalistic' form of governance is entrenched across the political establishment, from village chiefs to senators. This practice is also rampant in the supposedly apolitical bureaucracy, with department secretaries using their offices for their national campaigns, or lower rank officials usurping power for personal gains (Chua 1999; Reyes 2009).

Marcos's dictatorship was replaced by the EDSA³⁵ mass movement in 1986. Subsequent attempts to reform the economy have stalled in the face of a mixture of opposition from the powerful oligarchy and/or as a result of the government's own incompetence and corruption. The latter was most apparent in Estrada's regime, which was characterized as a period of gangster cronyism and mafia capitalism. Bello (2009:4) argues that a legacy from the Marcos dictatorship is a strong suspicion, and sometimes paranoia, towards any attempts by the state to reform or change the status quo. There is a seemingly reflex action by civil society, intelligentsia and the Catholic Church against strong policy actions by the state. The country became the epitome of Myrdal's (1968) 'weak state' characterized by the weak implementation of laws, a politicized military and bureaucracy, uncooperative civil society and a citizenry that lacks cohesion.

Accordingly, Bello described the Philippines as the 'anti-developmental state' and blames what he calls the 'EDSA system' for the series of political crises that haunted the post Marcos administrations. He argues:

[W]ith the rationale of discouraging tyranny, the American pattern of a weak central authority coexisting with a powerful upper class social organization ('civil society' in today's parlance) was reproduced in the Philippines, creating a weak state that was constantly captured by upper class interests and pre-vented the emergence of the activist 'developmental' state that disciplined the private sector in other societies in post-war Asia.

(Bello 2009:3-4)

Similarly, Almonte (1994:109) describes the political system as 'a democracy of pressure groups because the state lacks sufficient authority. Extreme competition in influencing the policy-making process results in the widespread politicization of society.' Frequently the state's policies have been reversed by recourse to the constitution and a legal system that is based on the American model, which was designed to curtail the state's central authority.

In their analysis of the extra-constitutional removal of Estrada in 2001, de Dios and Hutchcroft (2003:63) argue it shows how 'institutions themselves were weak, corruptible, and susceptible to capture, *even in their normal state*' (italics in the original). They argue that the changeover from Estrada to Arroyo was resolved through the invocation of a higher, extra-constitutional logic, with 'the Supreme Court reaching deep down to retrieve the most elemental of governance principles, *salus populi suprema lex*' roughly translated as 'the welfare of the people is the supreme law' (Doronila 2001). This legal principal echoes the credo of the East Asian developmental states.

Whilst the developmental state initially operated as an outright autocracy or a very limited democracy, the Philippines state extolled participatory democracy but in practice is an elitist democracy with weak state institutions. Finally, in contrast to the Philippines, the developmental states changed as the political and economic contexts changed, such as South Korea's and Taiwan's successful transition from

³⁵ Epifanio de los Santos Avenue (EDSA) is a major highway in the middle of Metro Manila where millions of civilians converged to support the military uprising in February 1986.

autocratic military rule to democratic civilian rule after achieving economic stability in the 1980s.

In sum, Philippine economic policies and strategies in the post-war period were controlled by the narrow interests of an oligarchy that has its roots in the plantation economy. The political system has similarly been captured by self-interested groups and resulted in a bureaucracy and institutions of governance that are highly politicized, personalized and ineffective.

4.0 Education in the Philippines

The pattern of governance outlined above was mirrored in educational policies and provision. In contrast to the situation in the Tiger countries, the Philippine state failed to exercise control of the education system. For the last 60 years, the state has negotiated with powerful interest groups – the Catholic Church, private education providers and external institutions such as the World Bank, business groups and private publishers of textbooks. The weakness of the state was reinforced by post-Marcos governments which sought to limit the role of the state. Thus, the new constitution developed in 1987 institutionalized the decentralization of education, which resulted in the dismantling of the central governance of education.

We contrast the role of education to that in the Tiger countries with reference to the following policy areas which have been identified (Fagerlind and Saha 1989; World Bank 1993; Green et al. 2007) as critical in supporting economic development, namely: national identity formation; education and the economy; population growth; and higher education. We also examine a feature which is distinctive in the Philippines, the role of education in supporting labour migration.

National identity formation

Within the Tiger countries, school curricula (with the exception of Hong Kong), especially in the subjects of social studies, civics and history, were directly controlled and harnessed for the purpose of indoctrinating pupils into a strong form of national identity (Lall and Vickers 2009). This often involved creating or highlighting: a sense of common lineage; shared ancestors; national foes; national heroes; and suffering/potential threats at the hands of foreign oppressors. Whilst the Philippines did not indulge in such political indoctrination, the outcome was the emergence of what Constantino (1978) describes as an amorphous national identity and weak nationalist consciousness. This is consistent with Doronila, 1989 findings, in her seminal work, that a majority of students (95%), given the chance, would choose a different nationality than Filipino and ranked the Philippines third (after the US and Japan) among the countries to be ‘admired, lived in and defended’. In parallel, most Filipinos in a 1998 language survey did not believe in the idea of showing nationalism through the use of a common language of instruction in schools (Gonzalez and Sibayan 1988 in Gonzalez 1998).

This disposition towards a ‘Filipino’ national identity is influenced by almost 50 years of education reforms financed by loans and grants from aid agencies (Bautista et al. 2008), which have used the school curriculum to promote their own

priorities. This is most evident in the social studies curriculum, which includes history, civics and citizenship education. The state's failure to use the curriculum to create a sense of national identity is most marked in the way the country's relationship with the US is portrayed. Since the 1980s, textbooks financed by the World Bank portrayed the Americans as 'accidental' colonizers (Constantino 1982), a recurring controversy which resurfaced in 1997 and in 2009 (Tubeza 2010). Similarly, the most widely used history textbook in both public and private schools avoids reference to the War of Independence against the US. As Diokno (2010) comments:

They call it an 'alitan (quarrel)' as if it's just a lover's quarrel. It was a war with so many dead on both parties, particularly on our side. There were atrocities, torture, the water cure, all of that. And yet they just call this a quarrel....It was the first war of liberation in all of Asia.

Wurfel (1988:24) describes the nature of the national identity portrayed by schools as a 'variety inoffensive to the colonial master'.

Historically, the state also had to contend with the Church when it did attempt to use schools to develop a sense of national identity. In 1956, the Church campaigned successfully against the Rizal Law, which mandated the compulsory study of the life and writings of Jose Rizal (who, along with Andres Bonifacio, led the revolt against the Spaniards). The government wanted pupils to study his original works but the Church objected. A 'com-promise' was reached by using a censored version of Rizal's 'anti-friar' novels (Locsin 1956), which were markedly less critical of the role of the Church in supporting colonization (Constantino and Constantino 1978). Thus, attempts to create a national hero have been thwarted by sectoral interests.

Finally, the weakness of the state to control the curriculum was compounded by the dismantling of the government's monopoly over textbook production. In 1995, the privatization of the textbook industry was legislated partly to address the chronic problem of shortages and the well-documented corruption in the education bureaucracy (Cariño et al. 1998). However, this merely resulted in 'decentralized' corruption fostered by unscrupulous public-private partnerships (Reyes 2009) and the provision of multiple, often low-quality titles for the same subjects (Lontoc 2007).

Bautista et al. (2008, 22) summarized the situation when they opined that the education bureaucracy had 'relinquished control over the curriculum and its content decades ago'.

Education and the economy

The dominant attitude of Filipinos towards the purpose of education is reflective of the American model of educational development, as described by Cummings (2003), which stresses a successful individual as the ideal type and consequently is seen as an individual right guaranteed by a succession of American-inspired constitutions. This individualism is also manifested in how Filipino scholars position education in the context of economic development. It is still portrayed as the individual Filipino's tool for poverty alleviation by increasing their opportunities for employment (de

Dios et al. 1995; Balisacan and Hill 2003). Thus, Filipino scholars tend to portray education more as an aspect of poverty alleviation (e.g. Herrin and Pernia 2003) and social development (e.g. Sanchez-Robielos 1999), together with population, health, sanitation issues, in their analysis of the economy. This is in contrast to the East Asians' practice which saw education as a tool for national development.

Marcos in his two-decade rule was the only post-war leader to make explicit attempts to establish a strong link between educational and economic progress. In 1969, he set up a commission to survey Philippine education guided with the 'belief that the economic and social survival of development of the nation was dependent on education' (Clarke 1977:61). In 1972, through his 'New Society' project, he decreed that 'education must be transformed so that it can become an instrument for the economic and social transformation of the country' (ibid.). It was also the first time that a long-term plan (10years) was formulated for the education system. Upon the declaration of Martial Law in 1972, schools were designated as the 'vital agency in achieving the desired reform in the New Society' (Clarke 1977:61-62), in which human resource development was linked to economic growth. Sadly this resulted in education servicing the one growing sector of the economy, the export of workers.

Currently, the country suffers from a labour-skills mismatch and graduate unemployment. The abolition of the National College Entrance Examination (NCEE), which led to unregulated access to tertiary education, is being blamed (Esplanada 2007). Many of the unemployed have degrees in teacher education, the humanities and social sciences. In parallel the Philip-pines exports graduates in medicine, nursing, engineering and other professional fields who are needed domestically. Higher education expanded without any centralized planning or effective system of quality assurance. In 2007, out of the 2.6 million unemployed, some 1.1 million were college graduates and 650,000 technical-vocational jobs were available in the local market, because the applicants lacked the required technical vocational skills.

In contrast to the major systemic reforms pursued by the Asian Tigers, the Philippines has engaged in promoting what has been termed 'projectized reforms' (PHDN 2009). This involves a reliance on an array of small-scale disjointed education projects that start and end in pilot activities and never translate into comprehensive or national reforms. Bautista et al. describe the process thus:

These reform efforts yielded unsatisfactory results because they were 'decisions ... made out of urgency or exigency, instead of long-term considerations.' Thus, education reform often resembles relief operations that hurriedly address obvious gaps and plug problematic holes in the system.

(Bautista et al. 2008, 5)

This model of education management is a classic case of externally induced reform (Cummings and Williams 2005), principally driven by the main donor, the World Bank. From a highly centralized system, the Department of Education has been pushed by aid agencies to decentralize since the 1990s, culminating with the decentralized-sectoral reform approach adopted in 2006 and funded by a loan from the World Bank. As the 2009 PHDN reports, 'in the last 20years, foreign donor agencies did not only fund these [reform] projects, they also initiated, nurtured, monitored and saw them through their completion' (23).

Education and population growth

The level of population growth in the Philippines has been consistently the highest in East Asia as illustrated in Table 3. In 2000, the Philippine Human Development Report stated that 'the most fundamental problem of the education system is that the rate of annual population growth is still 2.3%' (Gonzalez 2000:39). More recently, the 2010 Education for All report high-lighted that this resulted in increasing class sizes and declining education expenditure per child and warned that the Philippines is bound to fail in achieving universal primary education by 2015 (UNESCO 2010). Despite this, government initiatives to introduce a comprehensive family planning program were consistently and successfully opposed by the Catholic Church. Most post-Marcos leaders feared losing support if they contravened the Vatican decrees about family planning. More recently this tension has resurfaced with a stalemate between the Department of Education and the Catholic Church, which again successfully blocked the attempt in 2009 to introduce a sex education curriculum that promoted birth control.

Today, the Catholic Church is more influential, especially in the overwhelmingly private higher education sector where they are the largest provider (Gulosino 2003). Since 2000, they have been in a position of power with three prominent Catholic educators appointed to lead the Presidential Council on Education and the Department of Education.

Higher education

As shown in Table 4, the Philippines expanded higher education provision from the 1950s so that by 1965 nearly 19% of the age cohort attended universities. However, in the absence of a strong state, the expansion has been largely in areas weakly linked to the country's economic needs and has resulted in both a large pool of unemployed college graduates, which rose from 8.5% in 1980 to 14.8% in 2000, and the sector orienting itself to pre-prepare students to join the ranks of migrant workers (Ruiz 2006).

Policies, especially relating to higher education, were often challenged and reversed by recourse to the courts by sectoral interests. For example, a 1993 Supreme Court decision concluded that the state's attempts to control access to higher education, through the NCEE, contravened the academic freedom of institutions to decide whom to admit. This effectively curtailed the capacity of the state to control this sector.

The Marcos government was the first to introduce in 1972 the 'streaming' of secondary education graduates through the NCEE, which was the only assessment system that provided national measures of achievement. It was intended to address the rising problem of graduate unemployment and the imbalance between labour market needs and the training of graduates (Cardozier 1984). But early critics viewed this as a form of 'coercion' and means of 'control' and feared that the

government would steer the nation's manpower where it wished (Clarke 1977:60), which was partly confirmed when Marcos decreed the labour export policy in the 1970s (Ruiz 2007). Additionally, the implementation of NCEE was part of a response to an International Bank for Reconstruction and Development (IBRD) mission, which 'was convinced that the Philippine education system was not focused on the needs of a rapidly growing economy... education is regarded more as a constitutional right than an instrument of economic progress' (Clarke 1977:61).

The NCEE case is also indicative of how the influence of the private higher education sector has grown over the years into a lobby group which has successfully protected its interest with patronage from powerful politicians. This sector challenged the government and as a result the state lost control of the private higher education sector, as evidenced by the rapid expansion of private colleges and universities from 259 in the late 1940s to 1,665 in 2002, one of the highest rates of privatization in the world (Gulosino 2003). Finally, the state allowed the private sector to ensure its own quality and manage the accreditation of colleges and universities (Arcelo 2003). The sector grew unhampered, driven by the profit motive, and even acted as conduits for the state's labour export policy – effectively abetting the transformation of the Philippines into an 'emigration state' (Ruiz 2006).

Education for migration

The state's failure to establish a national identity or language has sustained what Constantino (1987) described as the continuing 'miseducation of the Filipinos' and fostered education's role as a tool for migration. He argued:

English introduced the Filipinos to a strange, new world. With American textbooks, Filipinos started learning not only a new language but also a new way of life, alien to their traditions and a caricature of their model ... [they] learned the lives of American heroes, sang American songs, and dreamt of snow and Santa Claus ... The lives of Philippine heroes were taught but their nationalist teachings were glossed over. Spain was the villain, America was the savior.

(Constantino 1987:47)

After independence, this portrayal was reinforced by World Bank-funded textbooks, which depoliticized colonial history, extolled American values and forged a 'dollar mystique' in young Filipino minds (Constantino 1982). This, along with the poor employment prospects and returns, has contributed to a fascination with living 'outside' the Philippines, especially in the USA, and the desire to finish a four-year college course and work 'abroad'. One major consequence of this pressure is that school and university curricula have increasingly been designed to prepare graduates for working overseas. Constantino argues:

Philippine academic and technocratic policy makers were prisoners of American methods and norms. The standards of education were such that its products were more attuned to the needs of a developed country than their own, hence the brain drain.

(Constantino 1974:49)

The desire to emigrate has also created a strong bias for four-year university education and an inferior valuation of vocational-technical education.

By the 1990s the educational system still did not have clear policies on the 'brain drain' issue (Swinerton 1991) with the situation described as 'out of control' (Tubeza 2011). But a prominent Secretary of Education described Filipino migration as a viable development strategy, as a 'source of foreign exchange and a natural way of population control' (Gonzalez 1992:21).

5. 0 Summary and conclusion

What I have shown in this chapter is the disjuncture in the approaches of the Philippines and the East Asian Tigers at both the generic level of political governance and in the way education was governed. The Philippines has had weak leaders, an absence of government control and a political system that allowed vested interests to capture and neutralize decision-making. Essentially, the Philippine democratic state displayed none of the features of the East Asian developmental states.

In the area of education, the country has relied on policies that markedly contrast with those implemented in the Tiger countries. As Myrdal (1971:351) postulated:

Effective reform of the educational system must assume a form of government control of educational institutions. There is no point in devising any over-all plan for the development of the educational system unless the government exerts its authority to ensure realization of the plan.

The Philippine state never successfully harnessed education to serving either the needs of the economy or to creating a common national identity. In contrast, the East Asian Tigers harnessed schooling to achieving economic development and to create a common national identity. Whilst the governments of the Tiger Economies imposed, often in the face of opposition, controversial policies in areas such as population control, the medium of instruction and limiting the provision of private schooling, the Philippine state was reduced to negotiating with other powerful institutions. The result was often a mixture of a failure to make policy or to implement it.

The stark contrast demonstrated in the historical comparison outlined above is, however, far clearer than the implications for the future that arises from that comparison. At one level the self-evident implication is that the Philippines can learn from the developmental states of East Asia by: abandoning a broken political system; replacing it with a 'strong state'; and a reduction in the tendency to rely on the USA as a model of best practice. However, such a conclusion risks making the naïve assumption that what worked elsewhere nearly half a century earlier (and has since changed) could be now adopted success-fully in the Philippines. It is questionable if Filipinos would now be willing to accept a strong state, or its achievement would result in serious opposition and conflict. Similarly, the post-war environment which was dominated by the Cold War facilitated (or at least tolerated) the emergence of strong states has been replaced by a very different world order. That order is portrayed by Chang (2008) as one which seriously disadvantages those poorer nations that are now attempting to join the ranks of developed nations. It is the prevalence of the more generic and universal features of bad governance, especially the high levels of corruption and the capture of the state by special interest groups,

rather than the creation of a developmental state per se, that needs rectifying. Without that, any policies pursued by the state, including attempts to strengthen the role of the state, will face an ongoing crisis of legitimacy.

Chapter 3

Education in the 'New Society' and the Philippine labour export policy (1972-1986)³⁶

Abstract:

The beginnings of the phenomenon of state-sponsored 'education for migration' were outlined in the previous chapter. This leads us to the next question: how exactly did the 1972 labour export policy introduced by the Marcos government make the education system complicit in this state enterprise? The present chapter characterizes the two decades of Marcos rule as the epitome of '*cacique* democracy'- a formal system of democratic politics combined with a feudal pattern of land-ownership and social order, including a stratified schooling system. Evidence suggests that sweeping reforms pursued by Marcos – extending from curriculum to educational governance and funding arrangements – did little to boost domestic economic development. Instead, they set the stage for the education system to continue training and certifying Filipino skilled labour for global export – a pattern that has continued to this day.

1.0 Introduction

Today, Filipinos are employed abroad as nurses, maids, doctors, seafarers, entertainers, teachers, and even as religious workers (priests and nuns), amongst many others; some also work as US military support staff. The 'overseas Filipino workers' (OFWs) are the largest source of dollar income for the country (equivalence ranging from 10-15% of the economy), remitting US\$ 26 billion in 2016 alone. These state-sponsored labor migrations have resulted in an exodus of workers and professionals (and eventually their families) that now amounts to approximately 10% of the entire Philippines population. From a temporary and seasonal employment strategy during the early American colonial period, labor export has become a cornerstone of the country's development policy. This was institutionalized under the Marcos regime (1965-1986), and especially in the early years of the martial law period (1972-81), and maintained by successive governments thereafter. Within this context, this paper investigates the relationship between Marcos' 'New Society' agenda, the globalization of migrant labour, and state sponsorship of labor export. In particular, it analyses the significance of attempts made to deploy education policy and educational institutions to facilitate the state's labor export drive.

The analysis proceeds in three stages, examining the interconnection of politics, economics, education and labour export policy under the Marcos administration. The first section investigates the nature of the post-colonial Philippine state (1946-1965), particularly the consolidation and emergence of a

³⁶ A version of this chapter was published in 2018 in the *Journal of International and Comparative Education* (JICE) 7(1), pp. 1-16, DOI: 10.14425/jice.2018.7.1.1

'national oligarchy' (Anderson 1988), the implications of the neocolonial relationship it has maintained with the USA, and how the expanding post-colonial education system was managed. It traces the country's developmental strategy through the early decades of independence to the 1974 Marcos edict on labour export. The second section focuses specifically on Marcos and his 'New Society' experiment (1972-1986).³⁷ It discusses the origins of the associated proposals to radically transform Philippine society and the performance of the Marcos regime in pursuing these.

The third section looks into the educational reforms designed to align schooling to the economic development agenda. Extant literature on this topic focuses principally on major reforms to higher education – i.e. post-secondary streaming, expansion of public higher education – and has mostly been conducted from a narrowly functionalist 'human capital' perspective (cf Alba 1979; Dubsky 1993; Gonzalez 1989, 1992, 1997). I argue here, however, that under the New Society scheme, the whole education system was subjected to sweeping reforms that need to be understood in the context both of the regime's attempt to maintain political control, and of its relationships with foreign agencies and creditors.³⁸ These reforms extended to curricular policies (civics and history education, technical-vocational education expansion, bilingual education), governance in higher education (*laissez faire* and decentralize) and funding (foreign loan-funded).³⁹ These measures ultimately did little to boost domestic economic development. Instead, they set the stage for the education system to continue training and certifying Filipino skilled labour for global export – a pattern that has continued to this day.

2.0 The post-colonial Philippines (1946-1965)

The US-Philippines neocolonial relationship

The post-American colonial Philippines has retained the structural features of the pre-war Philippines: a landed elite class, a semi-feudal land tenure system, and a heavy reliance on agricultural production for export (de Dios and Hutchcroft, 2003; Litonjua, 1994). Post-independence governments before Marcos also pursued development strategies dictated by the neocolonial relationship with the US, inaugurated with the ratification of two major treaties in 1946 – the Military Bases Agreement and Philippine Trade Act– as preconditions for the release of US\$620 in rehabilitation funds (Abinales and Amoroso, 2005; Constantino and Constantino, 1978). The trade act established a lopsided 'tariff-free' trading arrangement that

³⁷ Officially, the New Society was in effect from 1972 to 1981. To signal the end of military rule and burnish the image of the regime, the 'New Republic' was inaugurated with the re-opening of the *Batasang Pambansa* or the National Assembly in 1981.

³⁸ Some of these reforms were introduced at the behest of the country's foreign lenders (cf. Broad 1988 on the extent of the World Bank and International Monetary Fund's influence) and along the narrow agenda of the 'new oligarchy' under Marcos' tutelage. Recently published biographies of key Marcos technocrats, i.e. Sicat (2014) on long-term Finance Minister and former Prime Minister Cesar Virata, former Board of Investments Secretary Vicente Paterno's (2014) autobiography, and Landingin (2017) on Armand Fabella-former Chairperson of Government Reorganization Commission and later Secretary of Education (1992-94 under the Ramos government), have discussed these 'external' interference but only in broad terms.

³⁹ Towards the final years of the Marcos regime, education 'decentralization' was initiated starting from basic education under the World Bank –funded Program for Decentralized Education Development (PRODED), from 1983 to 1989. This culminated in 1991, which resulted to the breakdown of education governance into three sectors- basic education, vocational-technical education and higher education.

privileged American exports to as well as some agricultural imports from the former colony. The most controversial provision involved the granting of "parity" to Americans and Filipinos in rights to property in land, natural resource exploitation, and other commercial ventures. Whilst hosting the US bases provided additional state revenue, technology transfer and other benefits for the Philippine military, this policy attracted domestic criticism for entangling the country in Cold War geopolitics. The bases also facilitated the growth of the sex trade - a phenomenon I analyse in Chapter 7.

Post-war economy and development strategy

Aside from ensuring the economic and military dependence of their former colony (Litonjua, 1994), the Americans had also effectively rehabilitated most pre-war power brokers by suppressing the issue of wartime collaboration (Constantino, 1975). Cold War anti-communism was clearly a factor here, as it was in the American 'reverse course' in Japan from 1946-7, when much of the Japanese wartime elite was rehabilitated. But Anderson (1988) has suggested that concerns to resuscitate his family business interests in the Philippines were related to MacArthur's reluctance to break up the feudal system of land tenureship there, in contrast to the reforms introduced at American instigation in post-war Korea, Taiwan and Japan itself (where MacArthur headed the occupation authorities). The post-war era witnessed the consolidation of a Filipino 'national oligarchy' (ibid), as provincial elites congregating in newly developed gated villages in Metro Manila, some taking their places as elected officials following the reestablishment of the Philippine Congress. The disparate power bases of the local *caciques*, oligarchs (and even warlords) were now consolidated at the national level under the legal mantle of electoral democracy. Anderson dubbed the post-independence decades prior to the Marcos era as the heyday of '*cacique* democracy',⁴⁰ when ruling dynasties manipulated state's financial institutions to expand and or create new monopolies as they diversified from agriculture into urban real estate, hotels, utilities, insurance, the mass media, and so forth (Anderson 1988:16)

Nevertheless, the Philippines became Asia's second biggest economy next to Japan from the late 1940s until the 1960s (Overholt 1986; Ruiz 2006), partly because of favorable trade relations with the US and aid inflows linked to the Military bases Agreement of 1946 (Constantino 1975). But with landholdings largely retained by oligarchical families, and a post-war economic strategy focused on exporting plantation crops such as pineapples, coffee, tobacco and hemp tying the economy to the US, the country's commercial position remained fragile. By 1949, the economy had entered a crisis related to an increasingly negative balance of trade with the US. The government responded by instituting import and foreign exchange controls that lasted until the early 1960s (Dolan, 1993). This turn in policy helped to jumpstart manufacturing industry, which grew from 10.7 percent of GDP in 1948 to 17.9% in 1960 (de Dios and Hutchcroft, 2003), making it the flagship sector of the Philippine economy until the 1970's. As Bello (2009) puts it, 'the dazzling import-

⁴⁰ In the Philippine context, a *cacique* is the local political boss, and oftentimes also the local landlord. Before its bastardized incarnation in Spanish Philippines, *cacique* was originally the traditional clan or tribe leader in the Spanish colonies in Mexico and the West Indies. American colonial historiographies are replete of narratives about provincial bossism (cf Paredes, 1989; Golay, 1998; Hutchcroft, 2000) and even warlordism, enough for a scholar to describe the post-independence state as an 'anarchy of families' (McCoy, 1994).

substitution industrialization of the Philippines, which registered 6 percent to 10 percent annual growth rates in industry, was the envy of Southeast Asia' (p. 9). But only a favored segment of the *cacique* class who diversified into manufacturing from cash-crops production benefited from this short-lived increase in economic productivity.

Educational development

A continuing dependency on the US and oligarchical control of the economy resulted in conflicting development strategies by a succession of pre-Marcos governments. The impact of this on the expansion of education, as elucidated below, was further compounded by chronic budget deficits associated with the growing public school sector. This hobbled the system from the early colonial (1899- 1935) to the Commonwealth (1936-46) periods, making it difficult for the state to address increasing demand beyond elementary schooling. The task then fell to the private sector dominated by Catholic schools (now ultimately accountable to American rather than Spanish chapters), joined by newly arrived Protestant missionaries and a few enterprising returned pensionados from oligarchic families. The general absence of a centralized, state-directed educational expansion, along with a generally laissez-faire attitude towards the education sector, meant that the law of supply and demand prevailed as (Gonzales, 1989) further noted. However supply was actually controlled by the profit-seeking private institutions, which created programs designed to yield high return on minimal investment. By the time the Bureau of Private Education was finally created in 1975 to regulate the sector, an average of up to 75% of secondary and 85% of college students were enrolled in private institutions. The unhampered proliferation of programs in the liberal arts, education, business courses evoked another wave of 'mass education' reminiscent of the early decades of American colonization, but this time in higher education. Meanwhile, programs requiring significant investments in laboratories, equipment and specialized instructors training for the vocational-technical high schools and in engineering, health and medical sciences and technician courses in higher education were left in the struggling public sector. This resulted in an oversupply of college credentials but a dramatic deficit in technical skills later required in the manufacturing industries for the import substitution program as discussed further below.

In Chapter 2, I discussed how the Philippine state, unlike those of the East Asian tigers, did not adopt a sequential approach to developing the system during the post-war period; in other words, tertiary education was rapidly expanded before elementary and secondary education had been universalized and subjected to rigorous standardisation (Maca and Morris 2012). Carnoy (1974) viewed this pattern as problematic for a largely agriculture-based developing country like the Philippines, which had yet to achieve industrialization – generally seen as a prerequisite for the competitiveness of an emerging economy in the global capitalist system. With college education deemed as critical social capital by majority of Filipino families, the heightened demand reinforced the monopolistic behavior of the private education sector as discussed above. The absence of government regulation and a conscious strategy to match manpower needs of new economic programs resulted to disastrous result of, paradoxically, overeducation in non-technical fields

on one hand and continued lack of skilled technicians and engineers for the manufacturing industries. This also led to a stunted growth of research and development in the country with only the state-funded University of the Philippines left to organize programs in the science, mathematics and medical research, among others.

This education-industry mismatch further deteriorated with the import substitution industry stagnating by the early 1960s. With the domestic labour market unable to absorb the products of an expanded higher education system, the 'graduate unemployment' phenomenon first noticed in India began to cause alarm (Gonzalez 1989). By this time, even the modest number of graduates from technical, engineering and medical programs were suffering from underemployment according to Ruiz (2014). The rapid growth of the private market for tertiary education was being blamed for the failure of the government to 'regulate' the sector. Table 1 below shows the rapid progress of privatization in the Philippine higher education system, making it one of the most highly privatized in the world (Gulosino 2003). Marcos made few attempts to reign over this sector as discussed below.

Table 5. Tertiary school enrolment by public versus private institutions, 1946-1985

Year	Institutions			Enrollments *			
	Public	Private	Total	% Private	Public	Private	Total
1946	5	498	503	99	1	45	46
1955	26	351	377	93	7	177	184
1965	26	440	466	94	59	468	527
1975	126	628	754	83	106	660	766
1985	319	838	1,157	72	230	1,274	1504

Source: Data from Philippine Statistical Yearbooks and Philippine Securities and Exchange Commission adapted from Ruiz (2014) p. 101

*Data for 1946 in 10,000 and from 1955-85 in 100,000

Marcos government (1965-1986), 'New Society' experiment (1972-1981)

Ferdinand Marcos was the sixth post-independence president of the Philippines and the longest-serving: from 1965 to 1986. First elected in 1965 and reelected in 1969 amidst allegations of election irregularities (Wurfel, 1988), he declared martial law in 1972, a year before he was due to step down under the provisions of the 1935 Constitution, which banned presidents from standing for a third term. Marcos justified this move with reference to the 'communist threat', at a time when the movement's influence was spreading both in the countryside and in urban areas. Successive US governments accommodated his regime as a bulwark against the further spread of communism in Southeast Asia following the 'loss' of Vietnam and Cambodia.⁴¹ Having issued Proclamation 1081 on September 21, 1972, Marcos

assumed dictatorial powers under a system of government he called “constitutional authoritarianism” (civilian government was notionally restored on January 17, 1981). Furthermore, throughout his 21 years in power, the Philippines was in practice ruled as a ‘conjugal dictatorship’ (Mijares, 1975/2017) due to the enormous influence of Marcos’ wife Imelda over affairs of state – as elucidated below.⁴²

3.0 The ‘New Society’ program

Under his ‘New Society’ experiment, Marcos sought to implement a coherent economic development strategy without the complexities of democratic institutions of the old political structure. He overhauled the bureaucracy, introduced tax and budget reforms (including foreign borrowing) and institutionalized long-term economic planning which resulted in the crafting of the 1972 -82 Philippine National Development Plan. A national survey of education by the Presidential Commission to Survey Philippine Education (PCSPE) was also conducted in 1970 resulting to the formulation of the first 10-year Education Development Plan in 1972, highlighting human capital formation and manpower development as key objectives.

Most Filipinos welcomed the early years of the New Society and Marcos’ military rule due to subsequent improvements in peace and order, cleanliness and the generally more disciplined behavior of the people.⁴³ Massive beautification and greening projects undertaken by Imelda Marcos in her role as Governor of Manila also contributed to an initial optimism regarding the promised changes under the New Society program. However, unlike its Asian counterparts (particularly South Korea, Taiwan, Singapore and even Indonesia), the Philippines’ pivot towards authoritarianism was not associated with the creation of a strong foundation for sustained economic growth but rather degenerated into blatant kleptocracy by the ruling family and their associates. In the end, Marcos and his technocratic advisors did not really consider as models the ‘developmentalist’ forms of authoritarianism practiced in neighboring countries (Katayama, et al 2010), but perpetuated instead the patrimonial exercise of political power which has typified Filipino leaders since the American colonial era (Hutchcroft 1991).

Perhaps one redeeming feature of the New Society era was the so-called ‘golden age’ of Filipino technocracy (Tadem 2015), which saw Marcos recruit into his government an array of talented individuals from academia, industry and the military. There has recently been some renewed interest in this elite group of US-educated technocrats who were banished to the ‘Hall of Shame’ during the 1986 People Power Revolution (Tadem 2012; 2014). As technocrats, they were regarded as professionals and experts in their fields, and more importantly, “apolitical” (Katayama et al. 2010). Their main concern was to make sure that economic policies and development strategies they formulated were implemented, which during Marcos’ rule involved battles on many fronts. During the martial law period, they

⁴¹ Marcos in his 21 years in power came to epitomize the loyally pro-American developing-world dictator (Karnow 1989). Even at the height of his despotic rule, the US reciprocated by offering unwavering support through loans, grants and military aid.

⁴² She was also Metro Manila governor (1975-1986) and Human Settlements Minister (1978-1986).

⁴³ Even staunch anti-martial law activists and Marcos critics like Walden Bello (2009) acknowledge the early achievements of the regime.

were looked upon, particularly by the Philippine business community as well as by the country's major lending institutions – i.e. the International Monetary Fund (IMF) and the World Bank (IMF/World Bank) – as a bulwark against corruption, crony capitalism and patronage politics (Tadem 2015). These technocrats were the post-independence or modern incarnations of the US *pensionados*. Like their colonial-era counterparts, most were also scions of the oligarchy, who had received education and training from US Ivy League universities through American scholarships.

Economy and development strategy of Marcos government (1965-1986)

Whilst the New Society's cultural and cosmetic projects dazzled ordinary Filipinos, the economic foundations of the country were slowly being eroded by cronyism. The traditional cash-crop sector in which millions of rural Filipinos were employed was worst affected (Dolan, 1993). Distribution and marketing monopolies for sugar and coconuts were established whereby farmers were obliged to sell only to the monopolistic corporations and received less than world prices for their crops (ibid). The agriculture sector thereby became a cash cow for the Marcos' 'politics of plunder' (Aquino 1987) with nearly \$1.2 billion siphoned off from the sugar industry alone (Kessler 1986). Other industrial sectors were apportioned to favored businessmen, contributing to the failure of government experiments in import substitution and export-oriented industrialization.

The land tenancy problem persisted during the martial law era. Marcos during his two decades in power became one of the biggest landholders in the country (Aquino 1987), despite early rhetoric on land reform as a cornerstone of the 'New Society'. Cronyism turned vast tracks of land into corporate farms, prompting a US land-reform advisor to comment that the Philippines had one of the worst land tenure problems on the planet (Broad and Cavanagh 1993:8).

Finally, Marcos' 'debt-driven' development strategy resulted in the issuance of Presidential Decree 1177 in 1977 to revise the budget process to include, among other things, automatic appropriation for debt service (Section 32). This meant that all debt service obligations – amounting to up to 40% of the total state budget – had to be met before other government expenditure could be considered (Bello 2009). This policy would severely impact the fiscal position of succeeding governments, resulting to reduced state allocations for critical social programs like education, health and housing- items that top the list of priorities of most OFW families. Similarly, dollar remittances of overseas Filipino workers are a significant contribution to paying these dollar-denominated sovereign debts.

Labour export as an 'emergency' development strategy

Officially, the labour export program was launched as a stop-gap measure to deal with domestic unemployment due to the inability of the local economy to provide for the 700,000 or so new entrants into the labour force every year. But privately, for Marcos and his technocrats, the program from the outset had an important political dimension. According to senior technocrat and former Prime Minister Cesar Virata, 'the voice of the educated, young, urban and unemployed population became a major problem for President Marcos' (Sicat 2014). This suggests that concerns to maintain

political control and limit dissent informed the adoption of labour export as an economic strategy. As I have argued elsewhere, this can be seen as a revival and expansion of a strategy first employed by the American colonial state as a temporary remedy for political and socio-economic maladies during the early 20th century (Maca 2017). In 1972, two years before the labour export policy was implemented, unemployment was highest among urban youth (50% of the unemployed were 20-24 years old and 30% 25-44 years old). The first stirrings of protest amongst these unemployed youth precipitated the so-called First Quarter Storm from January to March 1970, led by leftist groups and activists (Doronila 1992).⁴⁴ Labour export was thus in part a tactic calculated to stem or divert growing dissent by finding work for under-occupied urban youngsters. It would become increasingly institutionalized in view of its profitability not only for private entrepreneurs in the recruitment and education and training sectors, but also, crucially, for a state keen to use migrants' dollar remittances to prop up the economy.

The labour export pivot also benefited from favorable US immigration policies reminiscent of the early decades of American colonization, which saw the first systematic deployment of Filipino migrant workers to the US. Almost a decade before the New Society initiative was launched, the U.S. Immigration and Nationality Act was passed in 1965 abolishing restrictions on particular nationalities (including Filipinos) and replaced it with a preference-based immigration policy focused on immigrants' skills and family ties with current U.S. citizens and permanent residents. Between 1965 and 1966 there was a near-doubling of annual Filipino immigration into the U.S. (from 3,130 to 6,093); by 1977, this number had climbed to more than 40,000. Filipino emigration to America far exceeded that to Asian countries during this period. But aside from North America as traditional migration destination for Filipinos, early inklings of future trends were visible from the 1960s, when Filipino loggers were brought to Indonesia to work in logging camps, and construction workers were recruited to work in Vietnam, Thailand, and Guam during the Vietnam War.

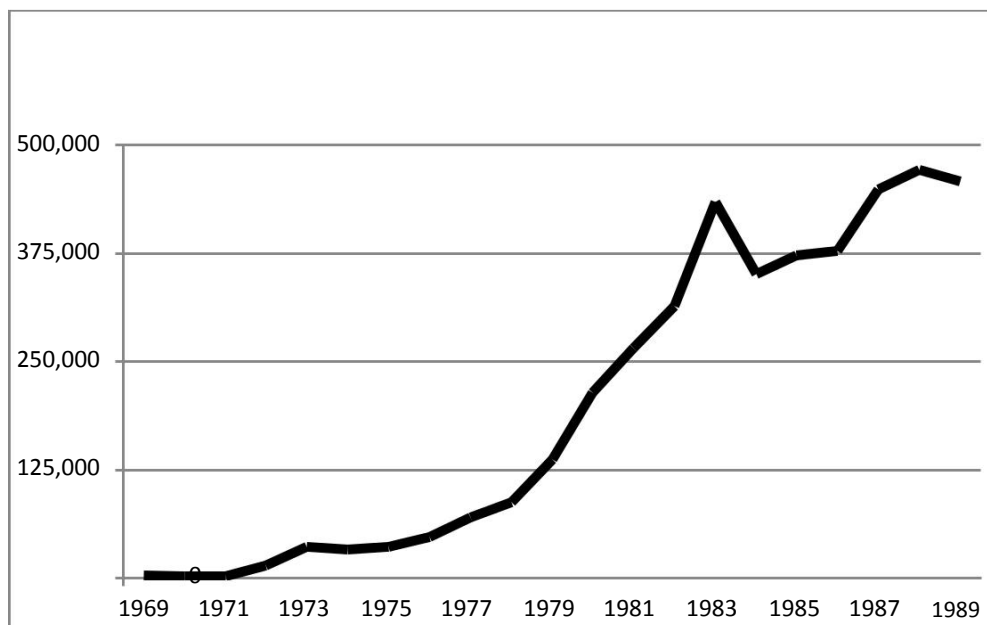
The new Labour Code of the Philippines was officially signed into law on May 1, 1974. This sought both to reform labour policies to mitigate the worsening unemployment situation and to systematize the program for overseas employment of Filipino workers. It led to the creation of new state agencies to manage the labour export business, including the Overseas Employment Development Board (OEDB) and the National Seamen Board (NSB), later (1982) consolidated as the Philippine Overseas Employment Agency (POEA). POEA initially had the task of promoting, monitoring, and regulating overseas employment. In 1987, the organization's regulatory functions were expanded to include the licensing and monitoring of private recruitment agencies, market development, skills enhancement and testing, and accreditation of foreign employers (Asis 1992). In the same year, the Welfare Fund for Overseas Workers was renamed the Overseas Workers Welfare Administration (OWWA). This administrative body was in charge of welfare issues facing workers and of providing support to their families and dependents.⁴⁵ A variety

⁴⁴ By February 1971, students and faculty from University of the Philippines-Diliman have joined transport groups protesting oil price and transport fare hikes leading to the establishment of the Diliman Commune at the university campus. Even Budget Vice Minister Manuel Alba acknowledged the student protests as impetus for education reforms in the New Society (1979).

of incentives were also simultaneously implemented to lower the cost of emigrating: tax was reduced, one-stop shops for processing travel papers were created, and customs duties were lifted. Finally, labour attaches (under the Foreign Affairs Ministry) and labour welfare officers (under the Labour and Employment Ministry) were deployed in Philippine embassies overseas.

The labour export program expanded exponentially. Within its first four years, the Overseas Employment Development Board had job orders from over 1,500 employers in the Middle East, Asia, and Europe. This included overseas placement program orders placed through the National Seamen Board and state licensed employment agencies (which brokered employment for 245,970 workers from 1974-1977). Figure 2 show how the number of OFWs increased from 3,694 in 1969 to 47,754 by 1976.

Figure 2. Annual deployment of Filipino overseas workers (1969-1989)



Source: for 1969-1976 data, Ministry of Labour as cited in Abella (1979, p.8); for 1977 to 1989 data, POEA in Asis (2008, p. 80)

It also shows that even before the labour export policy formally began in 1974, a rapid rise of labour migration – managed by the private sector – was already well underway. By harnessing and institutionalizing this growing trend, the Marcos regime sought both to extract a surplus and gain relief from the social and political pressures caused by rising domestic unemployment. The government takeover and eventual monopoly of the sector meant additional fee revenues from prospective migrant workers – from documentation fees (i.e. birth certificates, police clearance, etc) to insurance and placement fees (some partly paid by foreign employers). The

⁴⁵ Through the years, OWWA performance of its mandate has been patchy with few bright spots. I tackle further OWWA's shortcomings in Chapter 7, which delves into high profile cases of abuse (even murder) of Filipino entertainers in Japan (Ballescas 1992; Perez and Asis 1993).

government further decreed that overseas Filipino workers (OFWs) could only remit their dollar earnings to families back home through government banks.

Whilst the bureaucracy was reorganized and new agencies were created to support labour export, educational support to the new state enterprise was indirect and nonspecific (based on the detailed reading of policies formulated on the same period)⁴⁶. To avoid unwarranted scrutiny on the new labour export policy, the Marcos regime avoided explicitly linking education to Filipino overseas work. Policy statements and political rhetoric seldom strayed far away from prevailing conservative orthodoxies on the role of education in Filipino society. Nevertheless, political solutions to lingering issues like language of instruction, regulation of private education, and expansion of technical-vocational education, among others were carried out. These became critical levers in the deployment of education in support of the labour export strategy as elucidated in the following sections.

4.0 Education under the New Society

One of the ostensible aims of Marcos' grand vision for the New Society was the pursuit of a more egalitarian social order of a kind that previous regimes, from the American colonial period onwards, had failed to establish. He criticized the prevailing orthodoxy that state provision of education to all citizens would, of itself, bring about benign social change – equalising opportunity and accelerating social mobility:

Almost a century ago, it was said in the Western world that there would be no need for a scheme of economic redistribution as long as "an egalitarian educational system assures to rich and poor alike a competence in those things which are the riches of a human being - his learning, his skills, his opportunities in life! . . . But history unfolds itself in ways that defy the most confident of our assertions. Rather than as an equalizer in society the transmission of learning has often reinforced the inequalities of society. The pursuit of education can lead along paths that prove inimical to the realization of national government."⁴⁷

(Marcos 1974 in Manalang 1977:66)

This heralded a serious (and partly successful) attempt to align education and the political agenda under the auspices of the New Society experiment. Although there has been little recognition of Marcos as the only post-war Philippine leader strongly linking education to the country's development strategies (Maca and Morris 2012),⁴⁸ extant literature from education scholars (cf. Manalang 1977; Doronila 1996 and

⁴⁶ Archival research covered a review of: a) the 12-volume PCSPE report, b) presidential decrees and executive acts penned by Marcos 1972-86 and c) Department/ Ministry of Education and Culture issuances (1972-86).

⁴⁷ This is also the kind of message that Mao Tse-tung was emphasizing in China at the same time – during the Cultural Revolution. Marcos' utopian vision of a 'New Society' resulting from a 'democratic revolution' championed by a visionary leader superficially (and ironically) echoes the socialist manifesto of Chairman Mao – but without the crucial Maoist ingredients of class war and (often violent) attacks on elite privilege.

⁴⁸ Benigno Aquino III (2010-2016) and his government's flagship education program- K to 12 (rolled out in 2012) is comparable to Marcos' attempt to overhaul the country's education system in 1972.

Gonzalez 1989) and recent publications about Marcos technocrats (e.g. Landingin 2016; Sicat 2014) highlight efforts by the regime to synchronize education reform with economic strategy. Three years before declaring martial law, Marcos created the PCSPE (see above) with the mandate to analyze the performance of the educational system and its relevance to development goals (PCSPSE 1970). Marcos' efforts to overhaul the country's education system were the first substantial program of this kind since the establishment of the public school system by the Americans in 1899. According to one contemporary observer, he was guided by the "belief that the economic and social survival of development of the nation was dependent on education" (Clarke 1977:61). This resulted in the formulation of the first ever long-term plan for the Philippine education system (1972-1982) (Doronila 1996).

This plan designated the school as 'the vital agency in achieving the desired reform in the New Society' (Clarke 1977:62), and was clearly directed to the development of human resources for economic growth. This vision was first articulated in the Education Development Act of 1972 (PD 6-A) and reiterated in the post-martial law Education Act of 1982 (BP 232), highlighting the need 'to train the nation's manpower in the middle level skill required for national development', focusing on the technical-vocational education sector.

The resulting PCSPE recommendations were immediately translated into programs and projects, with seed funding from multilateral agencies like the World Bank and the Asian Development Bank. Under martial law, the state had the opportunity to redirect, adjust, and experiment with education and manpower development policies (Ruiz 2014), as discussed below. In 1972, directly under the Office of the President, Marcos created the Education Development Projects Implementation Task Force (EDPITAF)⁴⁹ through Presidential Decree 6-A. This special office was mandated to coordinate and manage most of these foreign-funded education development projects as shown in the table below. The extent of the direct 'inputs' these lending institutions were given into the formulation of Marcos-era education programs and policies remains unclear.⁵⁰ However, recent studies of the elite group of US-educated Marcos technocrats argue that their reputations as foreign-trained 'experts' lent legitimacy to the Marcos regime while channeling ideas dominant within the World Bank and the International Monetary Fund (Katayama 2010; Tadem 2012, 2014, 2015).⁵¹

⁴⁹ EDPITAF was later moved to the Ministry of Education and Culture.

⁵⁰ I would argue that aid agencies inputs into the framing of this document were more indirect; Marcos technocrats with experience of the international financial institutions 'milieu' did the drafting (Tadem 2014; Katayama et al. 2010). However nationalist scholars like Doronila (1989, 1992) and Constantino (1982) have argued otherwise which is partly validated by Jones (2007) historical study on World Bank's foray into education – including a criticism on the WB's interventionist stance towards pioneer borrower-states like the Philippines

⁵¹ Most of these studies were borne out of the 2010 study "Economic Policymaking and the Philippine Development Experience, 1960–1985: An Oral History Project," sponsored by the Japan Society for the Promotion of Science (JSPS). All interviews with Marcos technocrats were recorded but release to the public domain is subject to an embargo. Scholars involved in the project are yet to publish on the link of education ('manpower development and training' in their parlance) to economic policy making especially from the point of view of Dr. O.D. Corpuz (was at the helm of education, 1968-81 and 1979-83) whom they were able to interview before his death in 2013 and his successor Jaime Laya (1984-86).

Table 2. Loan-funded Education Development Projects (1973-1989)

World Bank	Years of implementation
1. Second Education Project	1973-1978
2. Textbook Project	1976-1982
3. Agricultural Education Project	1976-1982
3. Communication Technology on Education Pilot Project	1978-1981
4. Fishery Training Project	1980-1987
5. Sector Program for Elementary Education Project	1982-1988
Asian Development Bank	
1. Engineering Education Project	1981-1989
2. Technical Vocational Education Project – (TVEP)	1981-1989

Source: Nationalist Resource Center (1982) and EDPITAF (2016)

How the results of the 1970 study of the PCSPE and the blueprint of the 1972 National Education Development Plan were translated into education policies and structural reforms in support of the labour export program is elaborated below. Three reform areas emerge as critical – governance and funding of education, revival and expansion of technical and vocational education and a political solution to the language of education policy.

Curriculum reforms

History and Civics education

Under Marcos, the ‘national curriculum’ underwent two cycles of ‘redevelopment’ – first in 1972 at the onset of the New Society experiment and again in 1982 under the re-branded ‘New Republic,’ although this second attempt remained uncompleted at the point of Marcos’ overthrow in 1986.⁵² Major elements of New Society thinking found their way into the area of social studies – particular history and civics education (see Maca and Morris 2015).⁵³ Key concepts and messages about the New Society were also tied to government-wide initiatives in moral education, food production and the promotion of the ‘Green Revolution’, a ‘Buy Filipino’ campaign and education on the dangers of illegal drug use (Manalang 1977:64). Additionally, Marcos, who was a gifted orator, used many of his speeches to call on his countrymen to strive to ‘make the Philippines a great nation.’ His speeches and writings were compiled, published and distributed nationwide, although no study has been conducted to date regarding the extent to which they were used as teaching materials in schools.⁵⁴

⁵² This is evident in the incomplete issuance of prescribed textbooks under the new 1982 curricula. Under Marcos, the government has monopoly over textbook development and distribution for the public schools. Three centers were actively involved in textbooks development: the Language Study Center of the Philippine Normal School for the Communication Arts textbooks, English and Filipino; the Curriculum Development Center for Science and Mathematics, Science Education Center, University of the Philippines for the Science and Math textbooks; and the Social Studies Center, directly attached to the Ministry of Education and Culture, for the Social Studies (*Araling Panlipunan*) textbooks.

⁵³ I argue in the same paper that the impact of the ‘Marcos-authored’ tome called *Tadhana* (literally meaning fate or destiny), which was an attempt to construct an official ‘Filipino story’, cannot be ascertained given the sketchy reports on how it was distributed and utilized in schools.

Education under the New Society also engendered a hybrid conceptualization of Filipino citizenship. It signaled the construction of Filipino labour migrants as an archetype of the model citizen – a trend which eventually culminated in their celebration as ‘modern-day’ heroes by officialdom in the 1990s. Lesson themes on ‘working abroad’ began to feature in textbooks such as the widely used Grade 6 text *Araling Panlipunan – Pambansang Kaunlaran* (Social Studies-National Development) (MEC, 1980). A utopian vision for *Bagong Lipunan* (the New Society) is discussed therein, highlighting how the state is actively addressing employment issues facing ordinary labourers, through measures that include scouting overseas work opportunities:

Many of our workers are getting employment inside and outside the country. Various agencies under the Ministry of Labour actively seek placements for our workers. The Public Employment Office manages local placements. The Overseas Employment Development Board facilitates the securing of work opportunities abroad. From the previous lesson, give examples of countries where our workers are deployed.

(MEC 1980:194-195)

Unemployment in our country went down due to work opportunities abroad. Remittances by our overseas workers provide additional revenue for the government. At least 30% of their income is required to be sent through government-accredited banks. Aside from these benefits, what do you think is the impact of overseas employment on the social condition of our workers?

(MEC 1980:195)

The Marcos regime put a high premium on the production and distribution of textbooks as these were seen as playing a critical role in communicating the vision and achievements of the New Society.⁵⁴ Each book bore an introductory message under the signature of the President. Practically all subject areas (except for Mathematics and Science) featured themes explicitly related to nation building, civics, citizenship and the New Society. Education – and hence school textbooks – also became a vehicle for the personality cult of the Marcoses. A 1980 Grade 4 Communication Arts (Filipino) textbook for example, featured Imelda Marcos as *huwarang Filipino* (model Filipino) and portrayed her as *Ina ng Bayan* (Mother of the Nation), also mandating the study of a poem (*tula*) where she is further compared to the mythical Queen Esther of Persia (MEC 1980:112). During this period, schooling was the most potent platform for political socialization of most Filipinos. With resources available in schools severely limited, the textbook often formed the principal (or only) source of lesson content for both teachers and students (Hornedo

⁵⁴ In his two decades in power, around 6-7 publications (aside from *Tadhana*) is attributed to Ferdinand Marcos (his wife Imelda has her own published works as well). From 1965 to 1972 alone, 8 volumes of his speeches were published by the Public Information agency.

⁵⁵ For this chapter, a total of 37 Marcos-era textbooks (elementary and secondary levels) produced by the Department/Ministry of Education and readily available in the libraries of the Department of Education-Central Office and the University of the Philippines-College of Education were reviewed. The absence of proper and comprehensive archiving of textbooks and other curriculum materials produced by the education system is a severe limitation to educational studies similar to this undertaking.

et al. 2000; see Doronila 1989; Segovia 1997; Constantino 1982 for more detailed content analysis of Marcos/martial law era textbooks). Although New Society messages also permeated the modern mass media (radio, television and cinema), most rural inhabitants lacked electricity. Textbooks were rivaled in terms of reach and coverage only by comics, which the regime also harnessed and utilized extensively for propaganda purposes (San Juan 1978).

From redefining curricular goals to produce the ideal citizens for the New Society, and using textbooks to propagate messages concerning the positive prospects of working abroad, Marcos extended the reforms to the issues on medium of instruction and expansion of (technical) vocation education. The analysis on these two curricular areas is instructive in further understanding the role education in this new wave of Filipino labour migration.

Language in education/ bilingual medium of instruction policy

Aside from the pre-war leader Manuel Quezon (1935-1942), who initiated an articulation of Filipino national identity through a policy of using Tagalog-based Pilipino (later Filipino) as the national language, and promulgated code of ethics for Filipino citizenship, Marcos was arguably the only twentieth-century leader with a clear vision for nationhood and citizenship formation (David 2002; Maca and Morris 2015). As part of his efforts to promote a cohesive sense of national identity, he sought a political solution to the lingering issue of medium of instruction in basic education. This resulted in the controversial bilingual education policy (involving Tagalog-based Pilipino and English) promulgated in 1974. However, eminent linguist, educationist and former Education Secretary Andrew Gonzalez (2000) has criticized the bilingual policy as just another exercise in transactional politics. Gonzalez portrayed the policy as an attempt at compromise between the development of the national language and its use as a medium of instruction to facilitate learning, and the continuing use of English (38). Since the 1960s, the private schools attended by the country's elite have resisted abandoning the use of English as medium of instruction as 'they base much of their reputation on their supposedly superior ability to teach English' (Hunt and McHale 1965:69). Nevertheless, Marcos, by inserting the bilingual policy in the 1972 Constitution (Article 15 Section 3.3), sought to resolve decades of inertia regarding the legislated 'national language' among academics, politicians and regional leaders.

Gonzalez (1980), in his seminal study linking nationalism and language in the Philippines, identified two major factors behind the failure to instate Tagalog (called Pilipino after 1959 and finally Filipino in the 1987 Constitution) as a functional national language: continued refusal by non-Tagalog speakers to accept Pilipino, and the government's lukewarm propagation of the language. Perhaps Gonzalez himself, a US-educated linguist and former President of the private Catholic De La Salle education system, where English was (and still is) the medium of instruction from the early years to tertiary level, was himself unconvinced of the pressing need for an 'official' national language or languages'.⁵⁶ Not discounting class interests in the

⁵⁶ *Language and Nationalism: The Philippine Experience Thus Far* was published in 1980, 7 years after the passage of the 1973 Constitution with the provision on two official languages and yet Gonzales ended its

maintenance of English, he was nevertheless cognizant of its benefits, highlighting how 'Philippine socio-economic development thus far has been achieved using a borrowed common language (Gonzalez 1980:154).'

The use of English as medium of instruction (MOI) in higher education and largely- private secondary schools was re-affirmed by the 1972 constitutional provision on the two 'national languages'. This legislative fiat further increased academic programs delivered in English as a demand for overseas work expanded rapidly. Evidence further suggests a concerted effort by the Marcos government to promote the policy, with the issue dominating the 1976 Educators Congress. Even the Minister of Economic Planning, the last person expected to comment on the issue, was at pains to defend the bilingual policy (Sicat 1976). This was bolstered by rhetoric in academia about English language competency, portraying this as a distinct advantage for Filipinos vis-à-vis their largely monolingual Asian neighbors (Gonzalez 1998).

In the same session of the 1976 Educators Congress, buoyed by the initial gains of New Society's education reforms in basic education, Marcos proudly declared how the Philippines ranked second to the US in college or university enrolment and how 'educated manpower constitutes one of our exports to other countries' (Marcos 1976:31). This public declaration of pride in the ability of the state to train and supply Filipino labour internationally was an affirmation of English-based instruction, a practice long-established since the US colonial period. By engineering a political solution (1973 Constitution; PD 6-A series of 1973; Department of Education and Culture Order 25 series of 1974) to this issue, the state effectively (if indirectly) appropriated an integral component of the labour export machinery: continuous English-based training by Filipinos.

Expansion of technical-vocational education

Marcos made the case for the revival of technical-vocational education by highlighting the mismatch between the output of the education system and the manpower needs of the economy. He also highlighted the fact that economic development was lagging behind educational development, which was inimical to a developing country like the Philippines,

The introduction of education in the Third World, which in the colonial era initially began with a conception of education as something that confers ease, proved disastrous to the very effort of the society to advance. It bred as in our case a large group of graduates trained for white collar jobs. But the level of economic development was not such as to absorb this group in the modern sector of society. Here we have the supreme irony of education proceeding much faster than economic development, and creating difficult burdens for the country in terms of an educated unemployed.

(Marcos 1976:29)

The reorganization of the educational system by virtue of Presidential Decree 6 in 1972 resulted in the creation of the 13 administrative regions and the expansion of

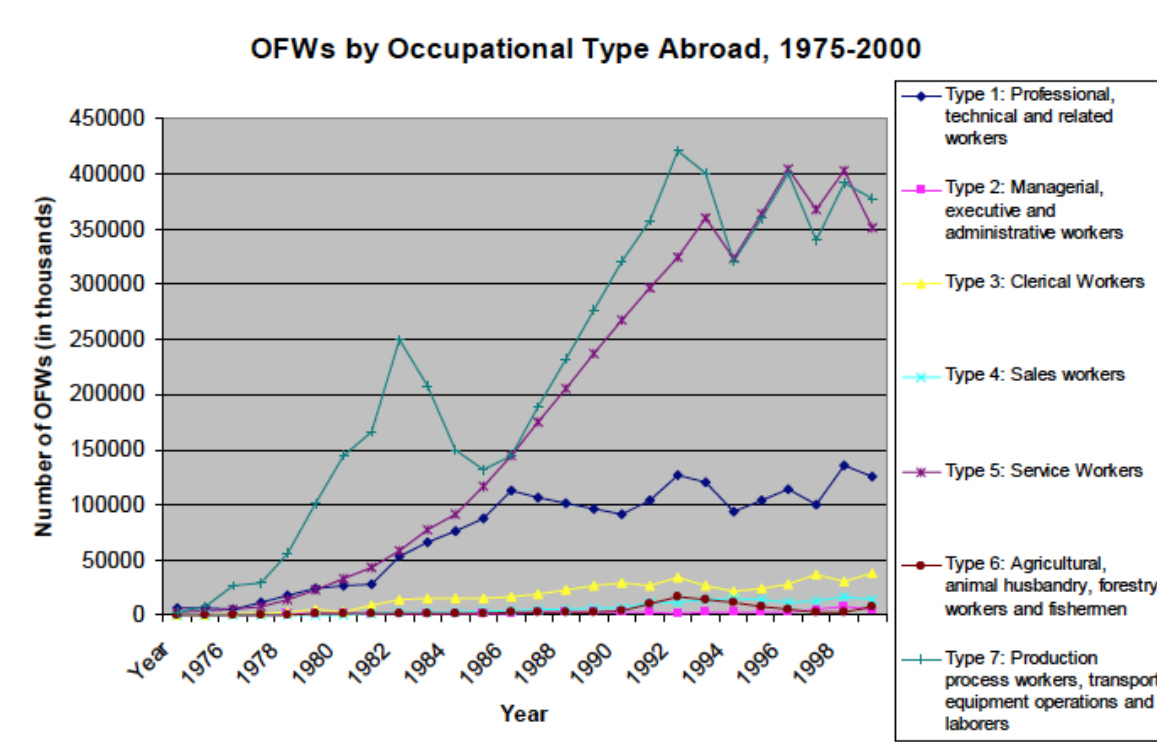
account in 1973 and did not cover the implementation of the Marcos' bilingual education policy formalized via Department Order 25 series of 1974.

the National Manpower Youth Council (NMYC) to address the need for middle-level skills development or technical-vocational education. Thus, through Presidential Decree 6-A, the formal educational system was effectively restructured to include vocational-technical education as the third level (after elementary and secondary education) in the new four-level formal education system (the fourth being the tertiary level). The cost of the educational restructuring program from 1973-1983 included a \$12.7 million loan from the World Bank used in the creation of 10 manpower youth training centers, three technical institutions, four science educational centers, and the upgrading of 11 agricultural schools to improve farming programs (Marcos1976).

This policy reform accomplished two things; it democratized access to post-secondary education by offering a more affordable route towards obtaining certifiable skills; and it ensured a steady supply of new technical skills needed for the export industrial zones in various parts of the country and supply the overseas demand for technical labour. Figure 3 below reflects the increasing trend in OFW deployment from 1975 onwards but the occupational classification system (types 1 to 7) designed by Philippine authorities blurs the demarcation lines on the supposedly hierarchical nature of educational qualification and training obtained by a departing overseas worker.⁵⁷ Nonetheless, the case for the expansion of technical-vocational education was partly enacted due to the difficulties encountered by the Marcos government in regulating the private sector which has grown unhampered since after WWII. Dumping the labour market with manpower incompatible to the economic requirements of the country, the Marcos government sought to re-organize and redirect post-secondary schooling in the country as elucidated below.

Figure r. Overseas Filipino workers occupational types

⁵⁷ Data with cross-referencing and or tagging of educational attainment vis-à-vis occupational category was also limited and systematized only in 1993 onwards. Thus, it is difficult to ascertain the extent to which wide-ranging reforms in technical-vocational education contributed to the exponential growth (especially by the 1980s) of the labour export business.



Source: Survey on Overseas Filipinos, 1993-2001 and Philippine Statistical Yearbooks, various years (in Ruiz 2014:147)

Governance and financing of education

Aside from the aforementioned curricular reforms, re-engineering the Philippine education system became the test case or model for further bureaucratic changes under the New Society (through Presidential Decree No. 1 Series of 1968). Marcos and his technocrats introduced reforms to overhaul the planning (and targeting), financing and regulating functions of the education bureaucracy. By integrating education in the centralized planning grid of the National Economic and Development Authority, human capital forecasting and allocation to key economic sectors were, in theory, rendered more efficient (Alba 1979). The industry players, mediated by different associations of private schools, were also closely involved in education forecasting (and planning).⁵⁸ Planning services were installed at different levels of education governance, simultaneous with the creation of Ministry of Education satellite offices in the newly created 13 administrative regions. All these were ostensibly part of the efforts to align manpower needs of the economy and educational planning and outputs and reinforced by other policies discussed below.

The Marcos government's attempts to redirect the education system culminated with the streaming of secondary education graduates as they moved to higher education.⁵⁹ In 1972, the National College Entrance Examination, a national

⁵⁸ Archival review of publications of Funding Assistance for Private Education (FAPE) between 1970 to 1980 reveal a healthy dialogue between education stakeholders- government, industry and private education sectors. FAPE Review (one of FAPE's official publication), for example have a published special editions which unbundled the findings, issues and recommendations of the massive 1969 education survey conducted by the PCSPE.

⁵⁹ As opposed to the self-regulation scheme through the 'accreditation system' established since the 1950s and preferred by the highly private secondary and tertiary education system.

school leaving examination, was introduced. This was aimed primarily at addressing the rising problem of a surplus of college and university graduates and the imbalance between labour market needs and the training of graduates (Cardozier 1984). But early critics (mostly nationalists and anti-capitalist scholars and activists) of this means of 'control' feared that the government could steer the nation's manpower where it wished (Clarke 1977:60), which was partly confirmed when Marcos decreed the labour export policy in 1974 (Tupas 2011).⁶⁰ Although no comprehensive evaluation of the effectiveness of the 2 decades of NCEE implementation (1972-1994) has been conducted, Marcos in 1976 reported a shift in the courses selected by students in college towards areas seen as more relevant to national development – the medical sciences, engineering and agriculture.⁶¹ But within a few years, with the economy floundering, the same medical and engineering graduates were among the first to be deployed for overseas contractual work.⁶²

Even with the NCEE in place, there was no slowing of the expansion of private higher education (see Table 1). The Marcos regime did not effectively rein in the private education sector. Instead, the *laissez faire* attitude of Marcos' predecessors, whom he had blamed for the 'overdevelopment' of higher education in particular (Ruiz 2014), was effectively maintained. The highly privatized and deregulated institutions operated by church-based organizations and influential family corporations were allowed 'self-regulation through voluntary accreditation by private groups. As Ruiz (2014) argues,

'the tension between state and elite interests continued to thrive when the state was heavily involved in transforming the postsecondary educational system. Instead of closing down schools and removing tax incentives for opening private tertiary schools, the state adopted indirect regulations for quality control by pushing the use of private accreditation associations

(126-127)

In other words, the Marcos regime accommodated the business interests of the elite in the education sector and made no attempt to close private schools that were oversupplying degrees and fueling graduate unemployment. Instead, the Marcos government developed the Professional Regulation Commission in 1973 to institute Board Exams and licensing of professions, rather than 'dictating the number of degrees private schools could grant per school year,' what a migration scholar

⁶⁰ But a few evidence also suggest that this measure was imposed on the Marcos government, that the NCEE implementation was a response to a World Bank mission finding which 'was convinced that the Philippine education system was not focused on the needs of a rapidly growing economy....Education is regarded more as a constitutional right than an instrument of economic progress (Clarke 1977:61).

⁶¹ In the end, the NCEE system was abolished through legislative fiat (RA 7731) in 1994 (Gonzales, 2000) at the behest of private schools that brought their case all the way to the Philippine Supreme Court. The NCEE petitioners' main argument focused on what was seen as the most objectionable portion of the screening system – disallowing enrolment on a formal college or university course by those with a score less than the prescribed cut-off point of the tests' (ibid 41). The petitioners argued it was a violation of the constitutional right of every 'individual Filipino' to choose the education he or she wishes to pursue. The NCEE system was also criticized for violating the constitutionally mandated academic freedom of private higher education institutions to decide what programs to offer and who to admit into their institutions.

⁶² OFW deployment data from 1975-1980 indicate a high percentage of 'professional' Filipinos (mostly with engineering and medical degrees) getting recruited for overseas work.

recently posited as the most radical action Marcos could have taken to rein over this sector (Ruiz 2014:126).

Further, the promise of a decentralized and region-specific development failed to materialize when reforms essential to modernizing the agricultural sector (e.g. land distribution, farming and fishing subsidies, etc.) were effectively abandoned when Marcos cronies were awarded monopolies from sugar to coconut and even banana and pineapple production (traditionally controlled by the Americans). Education support for agricultural modernization came largely through multi-million dollar loan packages from the World Bank and the Asian Development Bank, which funded agricultural and veterinary institutes, improvements to forestry and agriculture education, and the establishment of farmer-training centers, among others. Similar loan packages supported the establishment of youth manpower training centers, technical institutes and other measures for training the workforce that would be needed if and when the regional industrialization strategies bore fruit.

The failure of strategies for domestic industrialization meant that these new training institutions ended up as *de facto* training centers for prospective migrant labourers. These skilled technicians and craftsmen joining eventually the ranks of the educated unemployed with college diplomas discussed earlier. Whilst archival materials (especially the FAPE Review series for the 1970-75 period) and recent studies appraising economic policy-making in the Marcos years suggest that well-crafted plans and strategies were being spawned within the governing bureaucracy, these were strangled at birth by entrenched vested interests.

5.0 Summary and conclusion

More than fifty years after his ascent to power, narratives on Ferdinand Marcos and his New Society experiment highlight achievements in the areas of national security, civic consciousness, cultural renaissance (e.g. Lico 2003; Baluyut 2012) and a few bright spots in the economy (e.g. Paterno 2014). Marcos succeeded in recruiting bright, US-educated technocrats from academia and industry, which lent some degree of legitimacy to his authoritarian rule, especially in the eyes of the international community. The New Society also ushered the 'golden age' of Filipino technocracy, which laid the foundations for a more modern and professional bureaucracy. Economic and education planning was systematized, government codes were formulated across all sectors (i.e. tax code, insurance code, labour code) and management of international financing for development programs instituted in national agencies (i.e. EDPITAF in the Department of Education). As part of this administrative overhaul, Marcos and his technocrats in the labour department also formalized the labour export strategy, creating new agencies and codifying protocols for this state enterprise. Today, the Philippines is hailed as a model in 'managing' labour migration by the global community (Asis 2017).

The Marcos-era oral history project (Katayama et al. 2010) and recent biographical accounts (e.g. Sicat 2014) have supplied critical historical evidence partly confirming labour export strategy as political solution to the growing discontent of the young, educated working (and middle) class towards the abuses

and excesses of the Marcos regime. But Anderson (1988) had recognized earlier that labour export promotion was a masterstroke by Marcos (whom he branded the 'Supreme *Cacique*'), suggesting that the state had effectively facilitated the exodus of many of those who constituted the most significant potential threat to the Marcos regime: educated and politically conscious Filipinos. Had they not permanently emigrated (almost a million by 1980, especially to the US), they might have played a major role in Philippine politics as Anderson (1988) further underscored. The historical analysis generated in this chapter validates this early (yet speculative) assertion.

This chapter has exposed what was then the tension between the 'New Society' vision of broad-based domestic prosperity and national renewal, and the reality of domestic economic failure leading to labour export. The divergence between rhetoric and reality can be traced to the political and institutional order that Marcos inherited (and eventually reinvented) for his own ends. Meanwhile, the kleptocratic tendencies of the Filipino oligarchy reared its ugly head on the way the education sector behaved all this time, ensuring in particular the unregulated expansion of cheap college courses and raking profits from it. It can be argued that this singular education policy alone had directly contributed to the growth of labour for export.

In ascertaining the role (and influence) of external actors for the direction that Filipino policy in labour export has taken, the prevailing 'neocolonial' relationship with the US at that time becomes suspect. The whole PCSPE survey alone which supplied the basis for the educational reforms implemented and identified in this chapter as critical levers (whether intentional or otherwise) in the success of the ensuing labour export policy was premised on the whole idea 'to interest the World Bank in Philippine educational improvement' (PSCPE, 1970).⁶³ However this warrants a separate investigation altogether especially with emerging new materials (i.e. biographies, interview transcripts, diaries among others) from Marcos' inner circle.

Whilst some sectors in Philippine society blame Marcos and his technocrats for initiating (and exploiting) export of Filipino labour, it can be argued that they only systematized this exodus, which started in the colonial period. This relates to the socializing role of education in the Philippine context (explored in earlier studies: Maca and Morris 2012, 2015), which involved schooling and other institutions (especially the church) emphasizing the essentially private or familial nature of morality, and downplaying or ignoring the civic or public dimension. In other words, education in the Philippines has overwhelmingly been seen as involving the acquisition of skills, which one then deploys for individual benefit or for the sake of one's family. Its role in fostering or promoting engaged, participatory notions of citizenship that might lead to searching social or political critique has tended to be downplayed or ignored. Instead, education under Marcos (and since) has sought to minimize any popular expectations of the state (e.g. in the realm of

⁶³ This was explicitly stated in the accompanying transmittal letter of the survey commission to President Marcos (PCSPE, 1970).

welfare provision or domestic job creation) - even while ostensibly trying to foster patriotism.

Chapter 4

American colonial education policy and Filipino labour migration to the US (1900–1935)⁶⁴

Abstract:

The preceding chapter discussed the contemporary antecedents of the Philippine labour migration phenomenon. Here, we step back in history in an attempt to determine the contribution of schooling to an earlier phase of Filipino emigration. Among the questions tackled here are: What were the compelling reasons for Filipinos to leave the country under the American colonial state? How did the colonial education system facilitate (both direct and indirectly) the first wave of Filipino migration to the US mainland and territories? This chapter also examines the related issue of how public mass schooling was used by the Americans in the performance of their mission to “civilize” Filipinos. Free primary education was implemented right after the islands’ annexation in 1899 and was a critical component (alongside armed force) of the programme for their “pacification”. For the elite, education formed a route into collaborative involvement in the management of the colonial state. By the second decade of colonization, Filipinos were managing the civil service, participating in elected institutions and installed as mayors and governors. As in the Spanish period, American colonial governance was profoundly reliant on the collaboration of members of the *hacendado* class, which was thus implicated in the maintenance of long-established social and political hierarchies. But what did the maintenance of that *status quo* imply for ordinary Filipinos, now increasingly educated and literate in the language of the colonial power? Specifically, to what extent did this combination of socio-economic *stasis* and educational progress contribute to spurring early labour migration? Here I consider how far labour migration was seen to be, or functioned as, a mechanism for maintaining social and political stability in the American colonial period, and its relationship to an urge to fulfil what Kipling – writing of the American colonial enterprise – termed “the White Man’s Burden”.

1. 0 Introduction

Previous studies of the role of education in the American colonial administration of the Philippines (1899–1946), and thereby in the formation of the modern Filipino state, have concentrated primarily on higher education. These works have tended to highlight the training of Filipinos to serve the colonial bureaucracy, and the “political education” they received in preparation for independence. Studies of schooling, such as they are, have focused on language of instruction (cf. Constantino 1969/1987; Rafael, 2015), the vocational nature of the curriculum (cf. May 1984, 2010) and textbooks (cf. Iletto 1999 on historical treatment of the 1896 revolution, race, and nationalism in 1907 and 1926 public school textbooks)⁶⁵. The privileged status of

⁶⁴ A version of this chapter was published in 2017 in the Asia-Pacific Journal of Education (APJE) (Routledge) 37(3), pp. 310–328, DOI: 10.1080/02188791.2017.1339016.

⁶⁵ Most of these Filipino scholars are historians and essayists.

English in the education system and the phenomenon of Filipino labour migration (and emigration to the US in particular) has featured prominently in a number of studies, including recent works by Ruiz (2014) and Ortiga (2015). However, I will argue here that not only the use of English as the medium of instruction, but the whole schooling system as designed from the earliest years of American rule, contributed to fostering amongst Filipinos the aspiration to emigrate.

This chapter is thus a historical study that traces colonial precedents for, and (to some extent) origins of, the phenomenon of labour export in the Philippines, focusing on the role that education played in this. It argues that the process of socializing pupils towards labour migration (or emigration in general) commenced in the early stages of schooling, and was not, as suggested by studies of *Pensionados*⁶⁶ and or the exodus of Filipino professionals (i.e., nurses, doctors, teachers) (Ortiga 2015; Ruiz 2014), solely or even primarily the outcome of learning at tertiary level. This chapter also contributes to analyses of Philippine state formation, which have tended to interrogate the role of education (or the lack thereof) in detachment from its colonial moorings. This is partly a reflection of dominant assumptions of a politically “neutral” role for education (particularly primary schooling) in post-colonial Philippine state-society relations – assumptions challenged by a few pioneering critical scholars such as Constantino (1969/1987) and Doronila (1989).

In analysing the historical antecedents for the contemporary migrant exodus, and the contribution of education thereto, the current study represents part of an on-going project investigating the evolution of labour migration through the past century and its relationship with officially-sponsored notions of Filipino identity. The possession by the independent Philippines of a US-patterned education system was initially deemed auspicious for the country’s political⁶⁷ and economic⁶⁸ development (Lande 1965; Myrdal 1968), but by the end of the twentieth century it had largely been reduced to training and certifying labour skills for the global market – as I discussed in an earlier paper (Maca and Morris 2012). This chapter finds certain precedents for that later explosion of labour migration in the educational structures, policies, and curricula introduced during the colonial era itself. A subsequent study will further examine how and why labour export experienced a second spurt during the Marcos era, and the role of education in that period as it pertained to this renewed outflow.

As I have argued elsewhere (Maca and Morris 2012), in the 1970s and 1980s, during the Marcos era and thereafter, labour migration clearly served as a means of exporting domestic social tension; a safety valve releasing pressures that might have otherwise threatened the socio-economic and political *status quo*. Here, I argue that this was already the case even during the American colonial era. Using both archival

⁶⁶ The *pensionados* were mostly scions of Filipino elite families recruited to study in American universities. They were trained to lead the colonial civil service system in the pretext of self-governance.

⁶⁷ This topic was first explored by Carle Lande’s chapter (313–349) on the Philippines in Coleman’s (1965) *Education and Political Development*.

⁶⁸ The Philippines is presented comparatively as the “negative” case on education – vis-à-vis national development studies by Chang (2010) and even in the new edition of Green’s (2013) seminal work on education and state formation (originally published in 1990).

and published materials⁶⁹, I elucidate the colonial development of public schooling facilitated the trans-Pacific migration of Filipino labourers in the early decades of American rule. First, I discuss the impact of using English as the medium of instruction at practically all levels of education. Second, I examine the use of imported American-authored, US-centric textbooks which helped sow the seeds of the “American Dream” in Filipino consciousness. Finally, I investigate the heavy curricular emphasis on vocational-industrial and agricultural education at all levels of basic education which, I argue, was essentially an attempt to organize a cadre of cheap yet vocationally trained labourers to serve American business interests in the colony. Notably, this type of curriculum complemented the manpower needs of agricultural estates in Hawaii and the mainland USA, as well as those of Filipino *hacenderos* during the Commonwealth period (1935–1946).

2.0 Studies on American colonialism in the Philippines

Numerous studies of American colonialism in the Philippines have focused on political economy, foreign relations (especially on the US military bases), cultural-literary, colonial and post-colonial studies, and war history. Many of these studies have been doctoral projects conducted in Philippine and American universities.⁷⁰ There have been sporadic inquiries into Filipino immigration and diaspora populations, but these have tended to be conducted from an American perspective (see below). Some of these studies overlap with cultural (Rafael 2000; Tadiar 2009), historical and post-colonial studies (Go 2005, 2008; Kramer 2006) in the Marxist tradition (San Juan 2009). Meanwhile, studies of American empire-building inevitably feature analysis of the Philippines “case” (i.e. Adas 2006; McCoy and Scarano 2010). Among Filipino scholars⁷¹, much critical historiography of the American period has been associated with the University of the Philippines historian and essayist Renato Constantino. His work addresses a wide range of topics, including the controversial reinvention of Jose Rizal as an American-sponsored “national hero” (1969) and the benign portrayal of the American colonizers in late-twentieth-century elementary textbooks developed with loan funds from the Constantino (1982).

Meanwhile, Filipino labour migration and diaspora studies include biographical profiles (Bulosan 1946/2006; Scharlin and Villanueva 2000; May 2013) and women or gender-themed narratives (Parreñas 2001, 2006; Tyner 2004) embedded in racial (Baldoz 2011) and globalization discourses (Espiritu 2003; Guevarra 2010; Rodriguez 2010). A seminal study by Choy (2003) analyses the role of the Americanized nursing education system in the overseas training of Filipina nurses and the first wave of “professional migration” to the US in the 1920s. This is

⁶⁹ Related archival materials reviewed were those left behind by the Americans (majority are in the possession of US universities and archives) and housed at the American Historical Collection of Ateneo de Manila’s Rizal Library. Other records reviewed were Philippine Legislature and Philippine Commission reports (1901–1936) uploaded in HathiTrust Digital Library (www.hathitrust.org). Colonial-era textbooks, curricula, and reports of the Department of Public Instruction deposited at the Department of Education Central Office Library were also analysed.

⁷⁰ Cornell-based scholars under the tutelage of Benedict Anderson have bannered this group for the last three decades focusing mainly on state-society relations, identity studies and Philippine colonial historiography.

⁷¹ The other prominent and widely published Filipino scholars on American colonial era are Reynaldo Ileto, Patricio Abinales and Vicente Rafael who are all based abroad.

unusual in directly linking the discussion of labour migration to issues of educational development within the Philippines.

Generally, discussion of “colonial education” in the Philippines has highlighted the “uniqueness” of American colonization, particularly regarding the colonial government’s pursuit of free mass education (cf. Corpuz 1962; Salamanca 1968). These types of narratives resonate with autobiographical accounts of the first American teachers, collectively known as the “*Thomasites*”, (cf. Lardizabal 1991). In 2001, Racelis and Ick updated a 1959 compendium on the Thomasites, entitled *Bearers of Benevolence*, to commemorate the centennial of their arrival.⁷² Similarly, the Philippine Department of Education published a book in 2008 for the Baguio Teachers Camp centennial, the summer retreat of these American teachers. Other grand expressions of Filipino gratitude to the Americans and their colonial “legacy” include large-scale public artworks such as “Progress through Education” painted by National Artist Carlos Francisco in 1964 (and now part of the permanent collection of the Fukuoka Asian Art Museum).

Whilst there is limited existing literature focusing on the role of education in the development of the Philippine colony or its interrelationship with other colonial policies, a seminal work by American historian Glenn May, *Social engineering in the Philippines: The aims, execution, and impact of American colonial policy (1900-1913)*⁷³ is the most instructive and by far the most comprehensive study to locate education at the fulcrum of the American experiment to restructure Philippine society. There is also some limited research on the relationship between colonial policymaking in education and the management of Filipino labour migration. A few works cite education as a catalyst for early decisions to emigrate amongst pioneer migrants (Bulosan 1946/2006; Lasker 1969; May 2013; Posadas and Guyotte 1990; Scharlin and Villanueva 2000). Mostly biographical in nature, these provide material for the collective history of early Filipino migrants. Other studies in this field are mostly US-centric, reflecting domestic political issues within America (cf. Baldoz 2011; Fujita-Rony 2003; McCoy and Scarano 2010) – notably the racialization of migrant labour in which the Filipino narrative is always intertwined with those of other diaspora populations, especially other Asian minorities and Mexicans.

The succeeding section analyses the evolution of the Philippine colonial state and the confluence of factors that precipitated the early tide of Filipino labour migration to the US. Meanwhile, colonial education policies are reviewed in the context of the broader expansionist programme of the US, in order to elucidate their relationship with the social and political foundations of American hegemony in the Philippines.

3.0 Education and society in the Philippines before American colonization

Pre-colonial settlements in major waterways and trading posts were kinship-based and governed by customary laws and traditions unique to each group. The Muslim

⁷² In 2001, the American Studies Association of the Philippines also organized an international conference as part of the Thomasites centennial celebration and in 2003 a compendium of the conference papers was published (Villareal et al. 2003).

⁷³ Based on his doctoral thesis and published in 1981.

sultanates in the south (the Sulu sub-archipelago) were relatively more advanced and benefited from extensive trading with Arabs, Chinese, and other foreign merchants. Most of these ethno-linguistic groups had an alphabet system, although cultural reproduction and transmission of indigenous knowledge were largely through oral tradition. Under Spain, the Philippines was predominantly a feudal, agricultural economy with limited external trade, except for the Manila galleon trade.⁷⁴ But by 1815, when the Manila-Acapulco galleon trade had ceased, commodity exports (i.e., sugar, abaca, tobacco, and coffee) to the United Kingdom, China, British East Indies, United States and Spain were increasing, spurring Western investors (mostly British and Americans) to form joint ventures with domestic businessmen (Legarda 1999). Meanwhile, the Catholic Church opted to finance the colony's first commercial bank (1851), using its profits from the defunct galleon trade. But these gradual developments were eclipsed by the 1896 revolution and the American annexation of the islands in 1899.⁷⁵

Table 7. Public education annual enrolment by school levels for selected years

School year	Elementary	Secondary	College	Total
1898–1900	6,900			6,900
1900–1901	150,000			150,000
1905–1906	375,246	308		375,554
1910–1911	607,089	3,404		610,493
1915–1916	629,444	9,099		638,543
1920–1921	924,410	18,813	279	943,502
1925–1926	1,053,799	54,486	670	1,108,955
1930–1931	1,143,708	79,054	1,786	1,224,548
1935–1936	1,181,228	53,485	2,078	1,236,791
1940–1941	1,922,738	100,987	4,232	2,027,957
1945–1946	2,387,513	112,687	664	2,500,864

Source: McHale (1961: 337).

In the field of education, the Spanish had established a well-developed but essentially privatized higher education system. This feat is often highlighted by Filipino scholars, who at the same time tend to gloss over the neglect of public education in the colony (e.g. Torralba, Dumol, and Manzon 2007; Torres 2007). While it is true that the Spaniards set up the only European-modelled university in Asia at that time (the University of Santo Tomas, founded in 1611, predates Harvard University), public education at all levels was given less priority (see education data in Table 7) while the private education system catered exclusively to the indigenous elite.⁷⁶

The poor state of the public school system under Spain is attributable to several factors. First is the belated introduction of public mass schooling in the colony. Although the landmark Education Reform of 1863 was touted as

⁷⁴ The Manila Galleon Trade (1565–1815) brought porcelain, silk, ivory, spices, and myriad other exotic goods from China/Asia to Mexico in exchange for silver. Manila was just a transshipment point and did not gain much because the Mexican viceroys manipulated revenue sharing and the tax collection system for this trade (Abinales and Amoroso 2005).

⁷⁵ As Victor Clark (in Legarda 1999) observed “A period of industrial development and expansion immediately preceded the insurrection that marked the beginning of the end of Spanish rule in the Philippines” (p. 339).

⁷⁶ Including the late nineteenth century *ilustrados*, such as Jose Rizal, the Luna brothers and Marcelo del Pilar, who led the independence campaign against Spain.

modernizing the colony's education system, the central government in Manila failed to provide enough funding to sustain the reform. Parish priests, who were retained as supervisors of instruction, had to rely on local funds to pay for teacher salaries and capital outlay. Instruction was generally of poor quality, yielding correspondingly poor results (Corpuz 1967). Second, the deliberate use of the vernacular as medium of instruction severely limited access and participation by the indigenous population. The use of Spanish in convent and seminary schools only benefited the children of the elite who were able to afford this private education. The friars deliberately refused to teach Spanish to the locals out of fear that granting the latter access thereby to liberal ideas from Spain might stoke rebellion (Schumacher 1973 as cited in Gonzalez 1998). As the nineteenth century French traveller La Perouse commented, "the only thought was to make [Filipinos] Christians and never citizens" (as cited in Constantino 1978:33).⁷⁷

This period also witnessed the onset of Filipino "labour recruitment" both through formal and informal channels. Primarily involving an "individual" contracting process, this saw Filipinos recruited as pearl divers in Australia and deck men in vessels plying Asian routes. They were categorized as "Manila men" in shipping manifestos and a few ended up as mercenaries working for Hong Kong and Singapore-based traders (Aguilar 2014). The connection of early labour migration and colonial education at this juncture cannot be established. There was hardly any provision for education of the peasant class to which most migrant labourers belonged. It was most likely the grinding poverty and the general sense of hopelessness in the Spanish colony that pushed these forerunners of Filipino overseas contract workers to seek their fortunes in foreign lands.

Historical accounts (Lasker 1969; Mojares 2015) trace the phenomenon of Filipino mass labour migration to the chaotic period of post war reconstruction in the early 1900s, when the country was rife with poverty, unemployment, disease and pestilence, and agrarian unrest. It started as a government-sponsored inter-island migration programme especially to Mindanao (Lasker 1969), and later escalated to encompass overseas migration to the mainland US and the territories of Hawaii and Alaska. Early Filipino migrants were manual labourers in plantations and canneries, and during WWI served as mess boys in the US navy. Meanwhile, the mid-1920s saw an early example of professional or "skilled" migration by Filipino nurses. The next section analyses this first wave of Filipino labour migration to the US and its territories, focusing on two major groups: manual labourers, and those who participated in overseas education programmes, namely *pensionados* and later "self-supporting" Filipino students, as well as nurses.

Table 2. Filipino population in the mainland USA (1910–1960)

Year	Population
1910	406
1920	5,603

⁷⁷ The British Sir John Bowring, visiting from Hong Kong in 1859 further observed that: "Public instruction is in an unsatisfactory state in the Philippines – the provisions are little changed from those of the monkish ages" (cited in Corpuz 1976:197).

1930	45,208
1940	45,876
1950	61,645
1960	181,614

Source: Posadas and Guyotte (1990).

4.0 Early labour migration to Hawaii and the United States

Detailed narratives of early Filipino migration to the US mostly take the form of individual life stories, and otherwise tend to constitute a minor thread in the grand narratives of immigration celebrating the founding of the American nation (cf. Lee 2015 on Asian Americans). A few stand-alone studies have appeared in the past decade. One is a historical inquiry on the fate of Filipino seafarers dating back to the Manila-Acapulco galleon trade in the 1500s and their early settlements in California, Mexico, and Louisiana (Mercene 2007). Another focuses on the members of indigenous Filipino tribes who stayed behind in the US after being showcased as “human exhibits” at the 1908 St Louis World Exposition (Fermin 2004).

The migration of Filipinos to Hawaii and the mainland US was aided mainly by their status as US “nationals” between 1900 and 1934. They were not required to possess passports to enter the United States, only a certificate of good health. A series of “exclusionary” laws aimed at other Asian populations was also favorable to Filipino migrant workers (since they were exempted), particularly the 1907 US-Japan Gentleman’s Agreement⁷⁸ and later the 1924 Immigration Act which banned further Chinese, Japanese, and Korean immigration to the US. With Japanese migrants barred from working in any US territory, the Hawaiian Sugar Planters Association (HSPA) started recruiting Filipinos in 1906 and, by 1915⁷⁹ it had set up recruitment offices not just in the capital Manila but also in Cebu and in Ilocos. Labour recruitment was further intensified through personal networks of pioneer labourers in Hawaii. From 1907 to 1929 the number of Filipinos in Hawaii increased from 45,000 (approximately) to around 100,000.⁸⁰ More than one-third of these labour migrants ended up in the mainland US as shown on Table 8. Recruitment of Filipino workers who were already in California for the Alaska salmon canneries started in 1910 and Filipino “self-supporting students” joined them by 1920 during the summer and spring breaks.⁸¹ In addition to this kind of labour recruitment, there was also enlistment of Filipinos in the US navy as stewards/mess boys. Until 1936, Filipinos were the only foreign nationals allowed to enlist in the US armed forces, and the Navy was the only military branch they could join (Espiritu, 2003). From a total of nine people in 1903, the number of Filipinos in the US navy grew to 6,000 by World War 1 and hovered around 4,000 (or 5% of the total Navy manpower) during the 1920s and 1930s (Espiritu 2003:28).

⁷⁸ In the aftermath of Japan’s victory over Russia, the US agreed to ease restrictions on Japanese immigrants already in US soil but Japan will have to cease issuing passports to its nationals who wish to emigrate to the US.

⁷⁹ Under Act 2486 of the Philippine Legislature, the HSPA was granted a licence to recruit labourers in 10 provinces.

⁸⁰ By 1930, Filipinos comprise 18% of the Hawaiian population and 69% of the sugar plantation employees (Lasker 1969: 338).

⁸¹ By 1940, approximately 9,000 Filipinos worked in Alaska canneries.

The *Pensionado* programme which started in 1903, and Filipino nurses' participation in study and training programmes in the US by the 1920s, also provided opportunities for Filipinos to migrate. Although mass recruitment of Filipino nurses would occur much later during the 1960s, the Americanized university hospital training system in the colony accorded Filipinos nursing credentials on a par with US standards. By the 1920s, almost a thousand *pensionados* had attended US colleges and universities. Some of them opted not to return. New batches of Filipino students followed the *pensionados* as "self-supporting" or working students, while middle-class Filipino families with some resources sent their sons (and a few daughters) to the US as students with the long-term goal of permanent migration. In a series of studies, Posadas and Guyotte (1990, 1999) documented the lives of this group who capitalized on the American educational credentials they earned in the Philippines to gain access to the US higher education system. Those who settled in the Chicago area supported their studies by working in the postal and railroad services. In all, between 1903 and 1935, approximately 14,000 Filipino students attended colleges or universities in the United States (ibid).

5.0 America's civilizing mission and the colonial state

As discussed in the previous section, early Filipino labour migration should be analysed in the context of the prevailing societal conditions in the colony as well as the American colonial agenda. Sourcing cheap labour, from both the peasant and professional classes, was evidently part of the plan. Mass schooling ensured a steady supply of workers who were fluent in the language of the colonial masters (see below). There was a conscious drive to "Americanize" the native population as education policies on language, curriculum, overseas studies, and training familiarized Filipinos with the American perspective and way of life.

From the outset, the Americans very consciously attempted to differentiate their rule in the Philippines from that of European colonialists elsewhere, partly in an effort to address serious domestic opposition to their empire-building project. Segments of the American population found this contradictory to the [fundamental principles of the](#) Republican constitution (McCoy and Scarano 2010),⁸² and no different from European projects of national glory, God, and gold. In order to justify the colonial enterprise to a broad domestic constituency, the American authorities had to demonstrate the superiority of their ethical and material culture,⁸³ and the corresponding debasement of the colonial population. In other words, they needed to portray their new colonial possession as a land of inferior race and culture with a population impoverished both materially and spiritually. President William McKinley himself had announced in 1898 that God appeared to him in a dream and counselled him to take possession of the islands to "educate the Filipinos, and uplift and Christianize them" (Schirmer and Shalom 1987:22). Britain's "Bard of Empire", Rudyard Kipling, grandiloquently represented the colonial mission as a fulfilment of America's "manifest destiny" in his 1899 poem *The White Man's Burden: the United States and the Philippine Islands*.

⁸² The Monroe Doctrine (1823) also explicitly stated that the US would not tolerate European colonialism.

⁸³ The Americans believed that their material culture, ways of thinking, and modes of social organization of their progressive and democratic republic constitute a perfect model for civilizing the rest of the world (Adas, 2006, p. 196).

This civilizing mission was rooted in the general precept of a superior Anglo-American civilization as exemplified in paternalistic and masculine rhetoric (depicted in Figures 4 and 5 below)⁸⁴ and middle-class Protestantism. It was predicated on the Americans' manly ability to tame the wilderness and its savage inhabitants (Go 2005). In the process, the indigenous Filipino population was reduced to mere caricature – as poor, naive, and illiterate savages; “child-like” and “feminized”. This was despite the fact that many of them were (Catholic) Christians,⁸⁵ and that some amongst the elite had access to a formal, European-patterned system of education during the four hundred years of Spanish rule. The Americans were further able to rearticulate their colonial rationale by espousing self-governance (contrary to the British position) and demonstrating the superiority of their engineering skills and industrial technologies⁸⁶ (Adas 2006). Additionally, they were consistent in projecting themselves as disinterested and “exceptional” colonizers, insisting that their expansionist adventure was “unique, a benign matter of civilizing Filipinos..., an exercise in benevolent transformation rather than political power and domination” (Go 2005:11).

On the ground, this mission of “benevolent assimilation” was operationalized through political education and mass public schooling. Education was also seen as a means for transforming a non-egalitarian Philippine society, as the first Director of Public Instruction boldly declared:

Our aim is to destroy *caciquismo* and to replace the dependent class with a body of independent peasantry, own-ing their own homes, able to read and write, and thereby gain access to independent sources of information, able to perform simple calculations, keep their own accounts and consequently to rise out of their condition of indebtedness, and inspired if possible with a new spirit of self-respect, a new consciousness of personal dignity and civil rights.

(Barrows 1907:73)

In many respects, the Americans did indeed transform the landscape of mass public education in the colony. Between 1903 and 1940, the number of schools increased from 3,000 to 13,000; the number of teachers from 2,500 to 42,000; school and public libraries from a mere 12 to 5,700; school enrolment from under 300,000 to 1,860,000 (Mojares 2015). Although historical data on enrolment and dropout rates are far from reliable in the earliest years (May 2010), the new education structures at least expedited instruction in basic literacy for the masses (Mojares 2015).⁸⁷ Access to higher education, which was previously limited to an elite *crème de la crème*, was also democratized to a more limited extent with the establishment of the

⁸⁴ Figure 4 is an 1898 US political cartoon where US President William McKinley is shown holding the Philippines, depicted as a native child, as the world looks on. Figure 5 appeared in 1899 in a 10 cent magazine called “Outing Number, Judge” with a derogatory cover depicting President McKinley giving the Filipinos’ their “first bath” after doing the same for Cuba and Puerto Rico.

⁸⁵ The Protestant American elites regarded Catholicism as a debased and corrupted form of Christianity.

⁸⁶ Ironically this was first demonstrated in the deadly armaments used against Filipinos who fought a brief but costly war of independence from 1898 to 1901.

⁸⁷ For a comprehensive status and assessment of the Philippine public school system up until the Commonwealth era, see Chapter 4 of colonial bureaucrat-scholar Joseph Ralston Hayden’s (1949:463–560) *The Philippines: A study on national development*.

state-funded University of the Philippines in 1908. One notable outcome was the rapid Filipinization of the civil service by the 1920s. However, this favorable assessment was refuted by a Manila Times editorial in 1929 (as quoted in Lasker 1969:261);

Therein lies the tragedy of American-Filipino failure in the Philippines: Leaders of both races have over-emphasized political progress and have accentuated the natural Filipino disinclination to economic pioneering. We have created a great public school system whose chief aim seems to be to prepare its graduates for government work. The civil service rosters are filled with thousands of applicants for notoriously easy government jobs. A paternal system of government has encouraged this. A scale of pay, out of proportion to that in force in other countries of equally limited tax-collecting powers, encourages men in government office to seek political jobs. We make politics our god, and they fill our life. Every agency of life in the Islands, almost encourages the growth of this system.

The historian Bonifacio Salamanca (1968) judged American colonial policies in education (free and universal), religion (separation of church and state), and political participation (direct elections) to have been relatively successful. However, the promised transformation of Philippine colonial society failed due to the flawed premise that education alone would be a sufficient instrument of social change. The Americans claimed to see the new public schools as a means to gently abolish *caciquismo* through introducing a leaven of meritocracy into the social mix, without attacking the distribution of wealth that underpinned the *status quo* (*ibid*, p. 81). The Americans also had to deal with the complexities of transferring power from the US military to the Philippine Commission (1899), which rendered more urgent the task of establishing a symbiotic relationship with Filipino elites. A collaborative arrangement was formalized in 1907 through the inauguration of the Philippine Assembly. These episodes were fraught with factionalism and intensive politicking, which distracted colonial officials from mundane tasks such as the review and approval of the annual government budget (cf. May 1984). This often resulted in reactive rather than progressive budgeting, which in turn resulted in annual funding deficits for social services. Limited resources were further stretched by natural calamities, pestilence, disease, and epidemics which ravaged the colony in the first two decades of American rule (Bevoise 1995; Lasker 1969).

The failure of the colonial state to provide adequate social services was compounded by the continuing dependency of most of the population on insecure forms of tenancy, seasonal paid labour, and political patronage. The new colonizers did not engage in land reform or redistribution, and land (and power with it) thus largely remained in the hands of the traditional *caciques* and *ilustrado* families. The latter were further accorded opportunities to accrue formal political power, not least through their involvement in the representative institutions that the government established.

Rather than risk upsetting the social and political status quo through introducing reforms to land tenure, or by instituting progressive taxation, the colonial government sought to alleviate social tension by moving affected populations. Examples included the inter-island migration programmes of resettlement and homesteading in Mindanao for those from other provinces (e.g., the

Ilocos regions) who lacked arable land, or whose holdings were repeatedly devastated by typhoons (e.g., towns in the Visayas islands). However, critical support systems such as irrigation, farm subsidies, and rural credit facilities were not provided to the migrants. Overseas labour migration thus became an option of last resort for ordinary Filipinos. In a comprehensive study on Filipino immigration which informed the passage of the Tydings-McDuffie Act of 1934, several causes of labour migration were highlighted: over-crowding and unemployment in large urban centres, lack of opportunities for farm labourers resulting in hand-to-mouth existence and waste of manpower due to enforced idleness during the off-season (Lasker 1969:234).

Aside from poor economic conditions, a confluence of factors further abetted early Filipino migration to the US: (1) re-direction of the migration movement from intra-island to inter-island to foreign destinations, (2) increase in labour migration spurred by success stories of early pioneer-immigrants and returned-travellers, (3) propaganda or diffusion of exaggerated information of existing opportunities abroad mainly through letters from pioneer migrant labourers in Hawaii and the mainland US, and (4) the global expansion of the steamship business (ibid, pp. 325–326). However, it was the total impact of American influences in governing the islands, more particularly the Americanizing effect of public schools', which reinforced the desire of many Filipinos to emigrate to the US – as is elucidated in the next section.

6.0 Colonial education and labour migration

Public schooling was directed not only at moulding model citizens (loyal to the colonial state and competent as civil servants), but also played a key role in socializing future migrants to the colonial metropolis. However, before examining the education-migration relationship more closely, it is instructive to analyse first how the complexities of colonial governance discussed earlier were reflected in educational arrangements. According to May (1984), the colonial government (through the Philippine Commission) failed to articulate a coherent education policy for the newly established public school system. Relegating the task to the directors of the Bureau of Education and a succession of General Superintendents had resulted in contradictory policies, as is reflected in inconsistent articulation of curriculum goals and fragmented programme implementation (Foley 1978; May 1984). In addition, well-documented and high profile stand-offs (May 1984) between the Philippine Assembly (led by Osmena and Quezon) and the Americans in the Philippine Commission over issues such as budget and appointments also contributed to the problems of managing a fledgling public school system. Nevertheless, despite its limitations, a nationwide system of free and English-based education was made available to every Filipino.

Key areas of colonial education linked to early Filipino migration to the US are examined in this section. Aside from a survey of the various implemented curricula (heavily orientated towards vocational training), the use of English as medium of instruction from 1900 is also analysed, along with the use of imported or adapted American textbooks and American-authored textbooks, especially in history, geography, and civics. Finally, I turn to the *Pensionado* programme which started in 1903 and allowed Filipinos to study in US colleges and universities, giving

them the opportunity emigrate permanently to the US (making this essentially a forerunner of later Filipino “working students” schemes allowing legal migration to America).

Vocational education

The first curriculum, devised under the leadership of Fred Atkinson (1900–1902), was heavily oriented towards vocational training. It was implemented during the tumultuous early years of American rule, when colonial education officials also had to deal with issues of medium of instruction, religious instruction in public schools, and a centralized but inadequate funding system. The curriculum then shifted to the traditional “literary” education focusing on the 3Rs (according to the Jeffersonian tradition) under David Barrows from 1903 to 1909. Barrows had to deal with strong opposition from influential American businessmen (in the Philippines and the mainland US) against this curriculum shift (Foley 1978). Most of these critics were intent on maximizing the supply of cheap and uneducated labour that the colony could offer. From 1910 onwards, industrial education was vigorously pursued under the administration of Governor-General Cameron Forbes and Frank White, who replaced Barrows in the Bureau of Education. Philippine elementary schools were partly reorganized to support training related to basketry and handicrafts production.

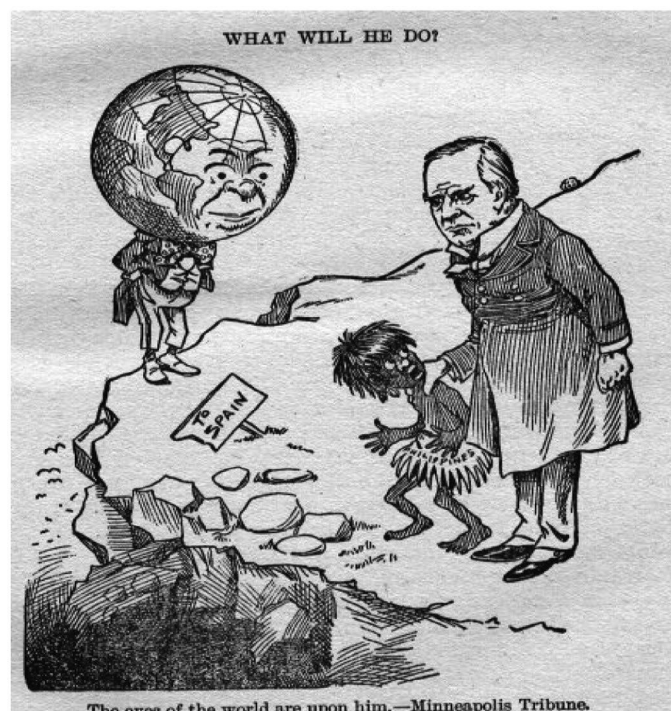


Figure 4. US-Philippines 'paternal' relationship

To some extent this vocational equipped Filipinos with skills required in manufacturing businesses of American companies operating in the country. Generally, the various curricula were patterned after policies with education strategies meant to assimilate US minorities (May 1984). Education was thus the

ideal platform for cultural and economic assimilation and at the same time, subjugation. African-Americans and the Native American Indians received intensive technical-vocational training to ensure that they performed the tasks assigned to them based on the highly stratified American society prevailing at that time (Butler 1934). In the case of the Philippines, the Americans believed that a more vocational orientation rather than grounding on the liberal arts, suited the underemployed and impoverished Filipinos (Adas 2006). But beyond addressing the economic needs of its subjects, colonial education was also aimed at rectifying centuries of misconception. To wit;

Public education at the elementary and secondary levels not only supplied trained mechanics and craftsmen, it aimed to inculcate values affirmed by the colonizers' self-representation and to disparage habits and attitudes associated with the 'tradition'-bound Filipino culture. Such prominent policy makers as Taft, Worcester, and Elliot insisted on the need to impress Filipino youths with the 'dignity of labour', thus counteracting centuries of Spanish and *ilustrado* disdain for physical work.

(ibid:176)

English as medium of instruction

Public mass schooling in English was a crucial element of the colonial project in the Philippines. As contained in President McKinley's 7 April 1900 Letter of Instruction to the Philippine Commission, English was to be the language of business, government, and education. Through the enactment of Philippine Public Law Act 74 a year later, this language policy set into motion an enduring legacy of US conquest whereby generations of Filipinos were instructed in English and exposed to American ideals and benevolence (Hsu 2013). English as the indispensable tool in the quest for the American Dream was best immortalized in Carlos Bulosan's autobiographical novel.⁸⁸ Bulosan, while doing domestic work for an American woman in Baguio to save for passage to America was told,

You don't need money, you could work on the boat. But English is the best weapon.

(Bulosan, 1946/2006: 69)

There is a similar narrative in the life story of another prominent Filipino labour activist – Modesto "Larry" Itliong. In an interview, Itliong narrated how a few years in primary school had equipped him with enough English language proficiency which will allow him to continue schooling once he landed in America (May 2014). His idea of finishing studies in the mainland US was partly influenced by a Filipino friend in California who convinced him that the American school system allows acceleration or skipping of grades, thus shortening school stay. The future Filipino labour leader dreamt of becoming a lawyer but never got to complete his studies

⁸⁸ *America is in the Heart*, published in 1946 but largely ignored until the 1970s when there was a resurgence of interest in Philippine studies at the height of the Marcos dictatorship. It is hailed both as a literary classic and a political commentary echoing the voices of the Filipino pioneers in California. Carlos Bulosan has a brief discussion on the colonial education he received under the Americans before he made the decision to cross the Pacific in 1931.

when he finally got to the US. The life stories of these two prominent Filipino migrant workers in the early twentieth century America are powerful testimonies to the initial impact of the American education colonial policies related to language education.

However, the empire-building narratives may have overstated the ideological or “civilizing” aims informing the imposition of English as a medium of instruction, downplaying the practical considerations that informed this decision. The use of Spanish or any Filipino language as medium of instruction in schools was deemed expensive in terms of hiring and training teachers (Corpuz 1967). Aside from the fact that there was not one dominant language used all over the archipelago, teaching and learning materials were also non-existent. The decision to adopt English was initially opposed by the local elite who preferred Spanish and, to some extent, Tagalog. In the end, this policy decision was arrived at partly as a reaction to the poor status of instruction in the public primary schools left by the Spaniards.

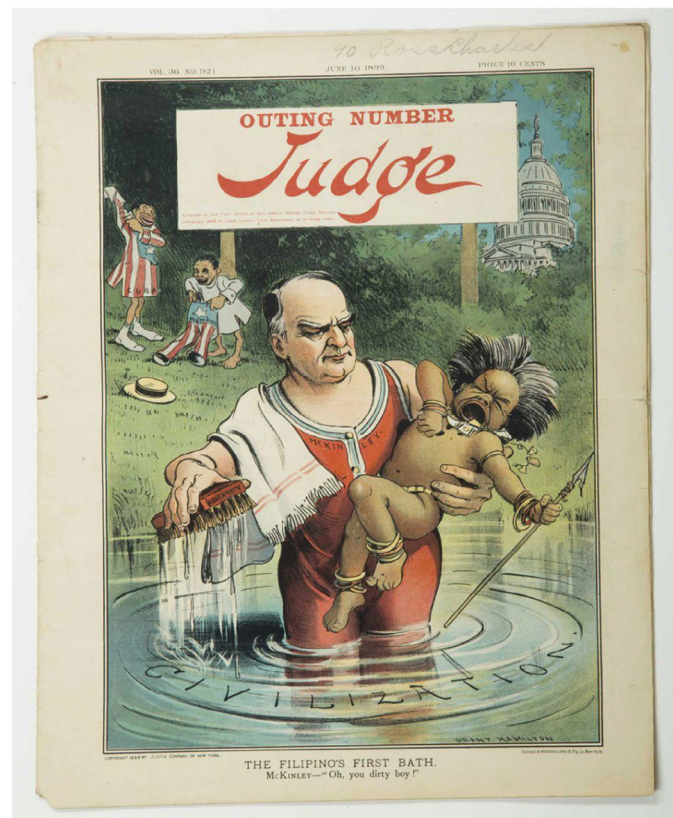


Figure 2. President McKinley giving the native Filipinos their “first bath.”

The expected benefits of English language instruction for Filipinos were trumpeted early on in official textbooks (Barrows 1905). Part of the narrative anticipates usage of the English language beyond the boundaries of the archipelago.

It is fortunate for the Filipino people that English has been introduced here and that its knowledge is rapidly spread-ing. Knowledge of language is power, and the more widely spoken the tongue, the greater the possession of the individual who acquires it. Of all the languages of the world, English is today the most widely spoken and is most rapidly spreading. Moreover, English is pre-eminently the language of the Far East. From

Yokohama to Australia, and from Manila to the Isthmus of Suez, English is the common medium of communication. It is the language alike of business and of diplomacy. The Filipino people, so eager to participate in all the busy life of eastern Asia, so ambitious to make their influence felt and their counsels regarded, will be debarred from all this unless they master this mighty English tongue.

(Barrows 1905:315)

Whilst learning in English did appear advantageous for some Filipinos, especially for pioneer US migrants, nationalist scholars like Constantino (1969/1987) have decried the colonial language policy as the beginning of the “miseducation” of Filipinos. He lamented that,]

English introduced the Filipinos to a strange, new world. With American textbooks, Filipinos started learning not only a new language but also a new way of life, alien to their traditions and a caricature of their model... [They] learned the lives of American heroes, sang American songs, and dreamt of snow and Santa Claus....

(Constantino 1969/1987: 47)

Material evidence discussed below provides some support for Constantino’s criticism but should be viewed within the context of the limitations of colonial administration in those critical early years. There was a need to immediately furnish instructional materials throughout the colony and importation of American textbooks was the most practicable option. Nonetheless, a parallel initiative to “adapt” these foreign materials, such as the American primers for English language instruction, was promptly initiated. The outcome was not always ideal, resulting in poorly adapted textbook exercises such as the following two excerpts from the adapted *Baldwin Primer* (Kirk 1899 US publication; Kirk 1902 Philippine adaptation): in Figure 6, Filipinos were made to “profess” their love for Washington and a “flag” (most likely the American “flag”), ostensibly as part of English language instruction; in Figure 7, the language exercise could pass as a form of propaganda to titillate the imagination of Filipino students regarding winter, snow, and skiing.

The myth of the American Dream in textbooks

The decision to use textbooks and other teaching materials imported from the mainland US exposed Filipinos to American values, traditions, culture and history. They also became familiar with American heroes and presidents as model citizens they should emulate. Anecdotal accounts of prominent migrants suggest that this had significant implications for Filipino identification with or interest in America. For example, the tale of Abraham Lincoln’s rise “from the log cabin to White House” served to ingrain the “American Dream” of rugged meritocracy in the minds of many Filipinos who were taught extensively to adopt this mythology of the self-made man. The image of a poor boy who struggled to get his education and triumphed in the end had a profound impact on early migrants such as Carlos Bulosan:

...Abe ‘walked miles and miles to borrow a book so that he would know more about his country’... ‘deep down in me something was touched, was springing out, demanding to

be born, to be given a name. I was fascinated by the story of this boy who was born in a log cabin and became president of the United States’.

(Bulosan, 1946/2006:69)

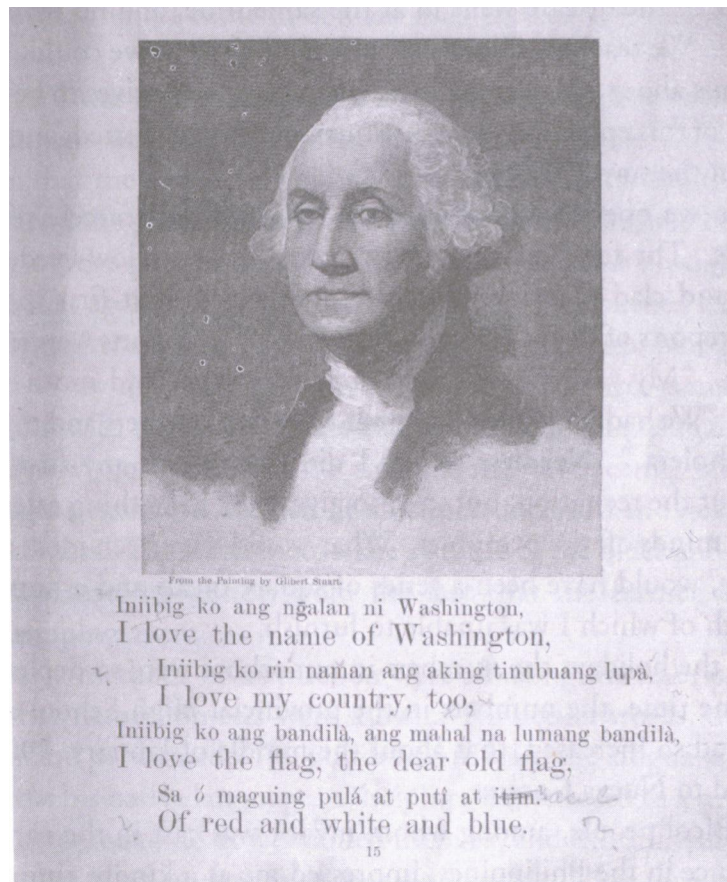


Figure 3. Ode to Washington in a bilingual reader (Kirk 1902:15)

Lincoln was also amongst those figures introduced to Filipinos as models of good citizenship. Teachers were expected to instruct students on the precepts of sound “character”, and the exemplars cited were mostly white American men, with the exception of José Rizal (Harris 2011:95). The Filipino Teacher’s Manual (Theobald 1907), for example, suggested that teachers ask their Filipino pupils “... why they like to read about Lincoln or Washington” and “... why everybody admires such men and calls them great men” (95).

Constantino (1978:70) lamented that these textbooks imbued a “dollar mystique” in the consciousness of Filipinos. The exemplars of the American way of life and imagery of modernity in imported textbooks reinforced their desire to migrate to the US (ibid). For the chosen few, what they read in American textbooks became a reality. The programme for the colonial government *pensionados* provided opportunities for a few Filipinos to stay behind after their studies and resettle in the mainland US. This programme was highly celebrated in textbooks distributed to all schools in the country. The following excerpt from Jernegan’s (1905:308) history

textbook, *A Short History of the Philippines*, highlights the myth of the self-made man and the primacy of individual social mobility through colonial education:

In October 1903, one hundred Filipino students sailed from Manila for America. These students were selected from all parts of the Philippines. They represented all the civilized races of the Islands. When they met upon the steamer the only language that all of them knew was English. This tie of language and their common education and aims bound them together as no other bond has ever united Filipinos of different islands and tongues. They were the first division of a young and noble army of Filipinos who will bring to their fatherland knowledge of principles, which have placed the United States of America in the front rank of great nations. These boys who will spend four years in the schools of America were chosen for their scholarship and character. They were not selected by favor because their parents were rich and influential. Many of them were poor boys. *This is true freedom—the freedom to win place and power by one's own work and fidelity.* (emphasis added)

The pull towards America was further reinforced by Geography education, with the earliest textbooks providing vivid details of US destinations. For example, the 1906 *Philippine Geography Primer* by Prescott F. Jernegan for the primary grades, added descriptors to US West Coast states: “most of the Filipino students who go to the United States spend the first few months in California, because of the mild climate” and “most of the ships, which come from the Philippines pass by San Francisco” (108).

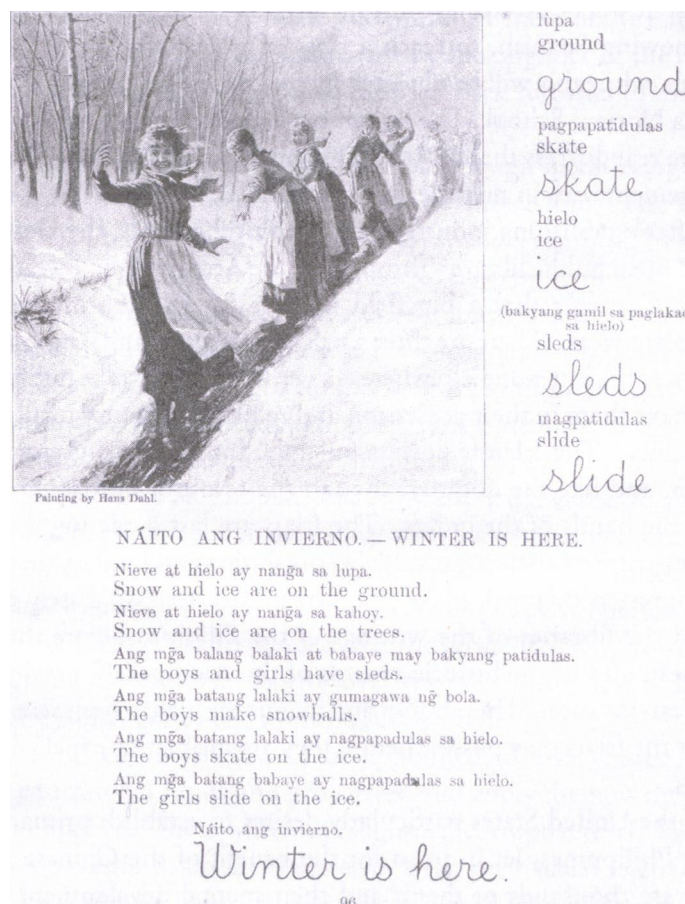


Figure 4. Winter season activities as a topic in a bilingual primer (Kirk 1902: 96)

The *Workbook in Geography for Grade VI (1939)* has a more explicit reference to Filipino labour migration with the following selected activities and probing questions (Bureau of Education 1939:3–5):

1. On a map of the world, locate the Pacific States. Why should these states be among the first the Filipinos go to? (Consider the position of the Philippines with respect to Asia and the Pacific coast of the United States.)... 4. Why were many of the Filipino labourers attracted to the northwestern coast of the United States? ... 5. Make an imaginary visit to Los Angeles. Write a letter to your classmates, telling them how and why Los Angeles grew to be an important commercial city, and why it became the center of the motion-picture industry.

This workbook was published in 1939, five years after the Tydings-McDuffie Act was passed which granted the Philippines its Commonwealth status and set the timeline for independence. Filipinos were thus stripped of their status as US “nationals” and the quota for Filipinos entering the US was reduced to 50 per year. This policy shift and related changes in colonial relations had a significant impact on the US migration pattern of Filipinos as shown in Table 8 but seemingly had a negligible effect on education policies or textbook content. The implications of this are discussed below.

After the wholesale importation of American textbooks and a slew of adaptations, the first textbook series authored by a Filipino and widely used in schools was the Philippine Readers⁸⁹ (first published in 1920) by Camilo Osias, a returned *pensionado* who was the first high-ranking Filipino appointed to the Bureau of Education (he later served as a diplomat and elected senator). These basic readers were intended to replace the earlier imported and poorly adapted schoolbooks that featured American stories, activities, and ways of life that were foreign to Filipinos. The new materials contained Filipino-oriented stories that included native folktales and legends, descriptions of animals and plants, and biographies (particularly of heroes like Rizal, Mabini, and Luna). But a fair amount of world literature and the biographical profiles of Lincoln and Washington, which had featured in the American teaching materials, were retained. Osias believed that Filipino exposure to foreign cultures through education was a necessity. This was partly influenced by his own experience studying abroad and the tacit recognition of increasing Filipino migration to America. This is summed up in the Book 4 preface: “This is an age of internationalism, and it will not do to deny our future citizens the privilege of adjusting themselves to modern conditions” (Osias 1932:iii).

A critical finding of this article is the continuity in the positive or neutral portrayal of the US even in the ground breaking Philippine Readers of Camilo Osias. Premised on the emerging worldview of internationalism, through the Readers, Osias also attempted to propagate his brand of nationalism (called Filipinism) “that

⁸⁹ The Philippine Readers also known as Osias Readers is one of the longest published and most widely adopted reading series for elementary students in grades 1 to 7 in the Philippines from the 1920s to the 1960s. Due to its use and scope, the Readers significantly impacted the development of Filipino mind, character, teaching, and learning for generations (Coloma 2005).

is compatible with world progress” (Osias 1940 as cited in Coloma 2013:319). He admonished Filipinos against “narrow nationalism”, telling them that they should instead pursue a “sane Filipinization that is by ‘no means an anti-foreign movement’, but one that is embedded in ‘civic responsibility’ and ‘world consciousness’” (ibid). To a certain extent, Osias was consciously addressing the impact of the 1935 shift in the Philippine status as a US colony and the backlash against the immigration restrictions imposed thereafter. Like their predecessors, the *Osias Readers* were also focused on individual success and personal development consistent with his utilitarian view on education as a means “to secure for humanity as a whole and for every human being the highest and fullest measure of freedom, happiness, and efficiency” (ibid). Nevertheless, he insisted that Filipino education must serve as “an agency of harmonizing cultures and civilizations” (ibid).

Whilst the aforementioned education programmes and policies may have fostered opportunities for Filipinos to engage in overseas work or long-term migration, colonial documents have no record directly linking colonial education policymaking in these fields to any programme catering to the man-power requirements of the colonial metropolis.⁹⁰ Nonetheless, Choy’s (2003) findings on the pattern of education, overseas training, and eventually permanent migration of Filipino nurses at the turn of the century show an indirect effect of a confluence of colonial policies (American-style hospital-based nursing education, overseas training, etc.) and “informal” networks of American and Filipino health institutions and personnel. This would be replicated in the mass US migration of Filipino nurses from the 1970s to the 1990s. However, what was missing in official legislation and letters of instruction (of the Bureau of Public Instruction) was made explicit in the official textbooks reviewed here (published between 1905 and 1935), where the US was openly promoted as a premium destination for Filipinos seeking work opportunities.

7.0 Summary and conclusion

Recruitment of cheap labour from the Philippine colony was part of America’s empire-building project from the outset. Thousands of Filipinos crossed the Pacific to become farm workers, manual labourers, and nurses from the early 1900s until the Commonwealth era. The colonial government also enlisted approximately 25,000 Filipinos to the US navy who saw action in the battlefields of Europe during WW1. A confluence of colonial policies facilitated this early labour migration, foremost among which was the privilege accorded to Filipinos as US “nationals” allowing them virtually unrestricted travel to the US. But the festering issues of poverty, land tenancy, and lack of social services also pushed ordinary Filipinos to seek economic opportunities in the colonial metropolis. Opportunities for the emerging educated class were still restricted by a highly stratified society deeply rooted in a feudalistic system. The remnants of the pre-American Filipino colonial society were effectively preserved under new collaborative arrangements with the indigenous elite. Provision of free education was viewed as a viable substitute for

⁹⁰ A survey of the work of the Philippine Legislature and Philippine Commission from 1900–1935 yielded very few references to the educational issues in the colony. This is consistent with the findings of May (1984) that education policymaking was left under the discretion of the General Superintendent of Education.

agrarian reform to appease the masses. Political and social reforms to address widespread poverty and land tenancy problems were deemed far too radical under a fragile (and experimental) colonial democracy (Paredes 1989).

Filipino migration to America stalled in the 1930s due to the Great Depression and the declaration of the Philippine Commonwealth in 1935 (and related changes to US immigration policies towards Filipinos). However colonial education policy and curriculum content was maintained. America continued to be promoted as the land of opportunity in textbooks, as evidenced in the 1939 geography textbook cited above – produced four years after annual migration quota for Filipinos was reduced to 50. Nonetheless, some segments of the educated elite – themselves mostly the products of this system of schooling – were by this time becoming critical of the migration phenomenon. Mojares’ (2015) seminal work on Cebu newspapers published in the late 1930s highlights views from the intellectual elite and some nationalist politicians amongst whose criticisms were deceit in recruitment of Filipinos, exploitation of Filipino labour abroad (especially in Hawaii which was dubbed as “working-man’s hell”) and the adverse effect of migration in the local economy. In a few instances, politicians derided these labour migrants as unpatriotic and migration as a “national ill” (ibid, p. 36). However, a century later, these labour migrants were to be saluted as “modern day” heroes (Guevarra 2010) for saving the national economy through their dollar remittances. Official state rhetoric highlights English-based education as a definitive advantage of Filipino overseas workers (Maca and Morris 2015) and the generally outward oriented curriculum (Cabiles 2012) that promotes Filipinos as global citizens.

As we have seen, economic opportunities in the US were also unabashedly promoted in official textbooks (i.e., geography workbooks). Filipinos were exhorted to prepare for the age of “internationalism”, foreshadowing more recent discourses on Filipinos as global citizens (cf. Maca and Morris 2015; Cabiles 2012). This can be discerned in the *Osiyas Philippine Readers*. Another recurring theme in the textbook narratives is how education can be used as tool for social mobility, with Jose Rizal and Apolinario Mabini typically cited as models, both great heroes and intellectuals (and generally promoted as averse to armed revolution). American-educated *pensionados* would later join the ranks of heroes as model citizens in the instructional materials. Central to these narratives was the perpetuation of the myth of the “self-made man” in the official curricula and textbooks (immortalized by Abraham Lincoln’s fabled story of “success”). This story is mirrored by the personification of the countless “Manong” (elder brother in Ilocano language) who through stubborn determination blazed the way for tens of thousands of pioneer Filipino labour migrants. Their powerful testimonies through letters (Lasker 1969; Mojares 2015) to families and friends and community sharing (Young 1982) as *balik-bayans*⁹¹ were able to convince others to try their luck overseas.

Whilst the colonial education received back home was widely credited with enhancing the economic opportunities of Filipino pioneers in the mainland US and its territories, it also marked the beginning of the storied quest of Filipinos for the elusive “American Dream”. This is reinforced by “success stories” of returned

⁹¹ A Filipino visiting or returning to the Philippines after a period of living in another country.

pensionados like the educator Camilo Osias who believed that Filipinos were at the forefront of the “age of internationalism” with their American education at the turn of the twentieth century. To some extent, Osias was the first in the long line of Filipino educationists to signal the transformation through education of Filipinos into “global citizens” (cf. Maca and Morris 2015; Cabiles 2012). This anticipates present day discourses on education as a tool for individual betterment pursued through seeking employment abroad (for which English proficiency is a distinct advantage), and images of overseas Filipinos as model citizens – cosmopolitan, multilingual, multicultural, citizens of the world. In the end, the ideal colonial subjects (in the mould of Osias and most of the returned *pensionados*) would articulate a justification of American involvement in the Philippines premised on “internationalization” and “progress” – hallmarks of modernization according to a Western (American) template.

Ultimately, this story foreshadows an unforeseen permutation (or even perversion) of the narrative of America’s civilizing mission – that they came not only to rescue the Filipinos from the backwardness of Spanish colonialism and guide them towards enlightened (American-patterned) cosmopolitan modernity, but also to prepare them for postmodern globalization. Three decades after independence, an independent Philippine state under a homegrown dictator promised Filipinos a “democratic revolution” that would resolve the contradictions in a deeply inegalitarian society dominated by local oligarchs and foreign interests. This new vision of Filipino modernity, however, was to rely on the mass export of labour, building on the educational foundations bequeathed by the Americans, while projecting their imagery of the cosmopolitan and global Filipino in ways undreamt of by those bearers of the “White Man’s Burden”.

Chapter 5

Education, national identity and state formation in the modern Philippines⁹²

Abstract:

The previous chapter historicizes the beginnings of the Philippine public school system under the American system. It also traces the inception of the 'American Dream' in the Filipino minds by virtue of the nature of the curriculum, medium of instruction and textbooks used. In this chapter, I analyse the evolution of policies and practices relating to political socialization of Filipinos since independence from America, focusing on three curricular areas: history education, citizenship/civics and language (medium of instruction). I show that post-independence governments have sporadically sought to introduce education policies designed to cultivate a strong sense of attachment to the Filipino state and nation. However, these policies have generally been ineffectively implemented due either to the intervention of strong sectoral interests, or because of broader failures of state capacity. As a result, citizenship education programmes in general, and history as a school subject in particular, have failed to develop a sense of shared national identity. The privileged status of English as the predominant medium of instruction in schools has also been maintained. These curricular trends have together helped to undermine the development of a cohesive national consciousness, while directing cultural and economic aspirations outwards – particularly towards the migrant labour market – diverting attention or energy away from any concerted popular drive to address the dysfunction of the Filipino state.

1.0 Introduction

Since independence from America in 1946, attempts by the Philippine state to construct a cohesive sense of national identity have met with limited success. In contrast to the situation elsewhere in Asia, where colonial histories are widely invoked for nation-building purposes, a prolonged and varied experience of colonisation has not been consistently or effectively harnessed to the task of creating a shared sense of identity. National identity in the Philippines, and the state's role in its construction, have previously been analysed from a variety of perspectives: some contrasting a 'non-developmental' Filipino state with its 'developmental' East Asian neighbours (e.g. Bello 2009); others focusing more broadly on 'strong state'–'weak state' dynamics (e.g. Abinales and Amoroso 2005); and still others positing a relationship between the strength of the family and the weakness of the state (e.g. McCoy 1993; Kaelin 2012). These studies in turn draw upon the work of Hutchcroft (1991) and Anderson (1983), who respectively portrayed the Philippines as a 'patrimonial state' and an 'imagined community'. But despite their varying emphases, existing studies agree in portraying a weak state whose failure to engender a strong sense of nationhood sets it apart in a region of

⁹² An earlier version of this chapter was published in 2015 with Prof. Paul Morris (UCL-IOE, London) an edited volume, *Constructing Modern Asian Citizenship*, by Edward Vickers and Krishna Kumar, pp. 125-148.

powerful and often antagonistic nationalisms. Indeed, as this chapter shows, official discourse has in recent years sought to portray Filipinos as uniquely 'global' in their outlook – in an attempt to make a virtue of the economy's massive reliance on remittances from migrant workers.⁹³

Almost everywhere, modern state formation has involved attempts to use schooling to merge the nation with the state by teaching future citizens to see their national identity as a natural expression of 'roots' (territorial, cultural and/or ethnic), shared values and common interests (Gellner 1983). At least on paper, the Philippines has been no exception in this respect. The goal of forging national identity and civic consciousness was alluded to in the early constitutions of the Philippines, and has been expressed far more explicitly in recent constitutional revisions, as the following extracts illustrate (emphasis added):

1935 Philippine Constitution (Article XIV, Section 8):

All educational institutions shall aim to develop moral character, personal discipline, *civic conscience* and vocational efficiency, and teach the *duties of citizenship*.

1943 Constitution (enacted during the Japanese occupation) (Article IX Section 10):

The government shall establish and maintain a complete and adequate system of *national education*, and shall provide at least free public elementary instruction, and *citizenship training* to adult citizens. All schools, colleges, and universities shall aim to develop moral character, *personal and collective discipline, civic conscience*, and vocational skill, secure social efficiency, and *teach the duties of citizenship*.

1973 Constitution (Article XIV, Section 4):

All educational institutions shall aim to *inculcate love of country, teach the duties of citizenship* and develop moral character, personal discipline and scientific, technological and vocational efficiency.

1987 'Freedom' Constitution (Article II Section 2):

All educational institutions shall inculcate patriotism and nationalism, foster love of humanity, respect of human rights, appreciation of the role of national heroes in the historical development of the country, teach the rights and duties of citizenship, strengthen ethical and spiritual values, develop moral character and personal discipline, encourage critical and creative thinking, broaden scientific and technological knowledge, and promote vocational efficiency.

The 1935 Commonwealth Constitution was promulgated in preparation for the transition from American rule to Filipino autonomy. This was revised in 1943 during the Japanese occupation, with the new constitution emphasising strong, centralised state control over the education system – the sort of system pertaining in Japan and its

⁹³ One reflection of the international outlook among many Filipinos – which government rhetoric has recently sought to celebrate – is perhaps evident in the findings of a recent citizenship development programme, which highlights Filipino participants' positive attitudes to attempts to forge an ASEAN regional identity (Hirata and Morishita 2014).

East Asian colonies. After Japan's defeat in 1945, and formal Filipino independence in 1946, the 1935 Constitution was reinstated until 1973, when a new constitution was drafted under the Marcos dictatorship. The current 1987 Constitution has been dubbed the 'freedom constitution', signifying the restoration of civil liberties and democratic processes after the Marcos era.

In reality, while post-independence governments have increasingly espoused the aim of harnessing education to the promotion of a strong national identity among Filipinos, the effectiveness with which such intentions have been followed through, especially at the level of the school curriculum, has been inconsistent to say the least. The increasingly nationalistic tone of the constitutional statements cited above can be interpreted as reflecting elite concerns at the weakness of national identity, the failure of successive attempts to strengthen it, and the purportedly dire implications for the country's development. Numerous studies have highlighted that most Filipinos do not strongly identify with a Filipino 'nation' and display ambivalence regarding civic participation (Diokno 1997). Citizenship has been largely conceived in terms of participation in electoral exercises (Zialcita 1997; Kaelin 2012).

The lack of a strong sense of attachment to the nation has also become bound up with the huge reliance of the Philippines' economy on migrant labour, and its implications for the capacity of many Filipinos to engage with social and political issues at home – though in this respect causation could operate in either, or both, directions. Since it began to be officially promoted during the 1970s, the export of labour has become institution-alised, with education accorded a role in this process (Maca and Morris 2012). Recent studies suggest an increasing trend towards the promotion of Filipinos as 'global' citizens, ostensibly to foster intercultural understanding and global interdependence (Cabiles 2012), and to portray Overseas Filipino Workers (OFWs) as modern day national 'heroes'.

Attempts to address educational issues of whatever kind have been hampered by the state's fragile legitimacy and limited capacity to implement change. Systems of educational governance mirror this general weakness of the state, which is typically reduced to negotiating reforms with powerful stakeholders, such as the Catholic Church, foreign aid agencies, private university owners and textbook publishing groups. In the sphere of education and beyond, analyses of the post-independence Philippines consistently portray a state in thrall to a landed elite whose rent-seeking behaviour has roots traceable to the Spanish colonial period. The use of schooling to further construction of the kind of national identity mandated in the Constitution thus faces considerable social, political and institutional challenges.

This chapter explores the many attempts that have been made by the state to harness the school curriculum for such a purpose. We begin by looking at the history of Filipino state formation and the evolution of national identity attendant on this process. We then examine three key elements of schooling typically used for purposes of identity formation: citizenship programmes, history education and language of instruction.

2. 0 State formation and national identity

The pre-colonial Philippines was characterised by varied kinship-based political systems scattered across the archipelago. One of these ancient governance systems, of the *balangay* (boat)-dwelling or seafaring forebears, preceded the current *barangay system*,⁹⁴ the basic political unit of the modern state. Meanwhile, in the south, the Muslim sultanates in Mindanao and the Sulu archipelago, with their long history of trade and exchange with mainland and Southeast Asia, developed a more sophisticated political system with the trappings of pre-modern statehood. Apart from the Arabic-based learning system of early Filipino Muslims, other ethnic groups had their own indigenous learning systems with scripts such as the *alibata* and *baybayin*. These fairly disparate groups coexisted for thousands of years, but their development was radically altered by the onset of Spanish colonisation. One consequence was that the relatively developed literary cultures of these pre-colonial indigenous groups were effectively obliterated (Mendez and Jocano 1991; Doronila 1997).

The Spanish colonial state survived for almost four centuries, relying on the proverbial 'cross-and-sword' mode of colonial administration (Abinales and Amoroso 2005). The Catholic Church was an active agent of colonisation and remains to this day an extremely powerful force in Philippine society. Education for the privileged few involved induction into Catholic orthodoxy, while overseas university education (mainly in Spain) trained men for a career serving the Crown. Meanwhile, the so-called *ilustrados* ('enlightened ones'), including Rizal and other key figures in the revolution against Spain, were scions of a rising indigenous middle class, many of whom travelled to Europe to study or seek political sanctuary. They were greatly influenced by Enlightenment ideals of liberty, equality, the centrality of reason and the rejection of oligarchy, both secular and clerical (Francia 2010). Back home, from 1863 the Spanish colonial government embarked on a belated attempt to establish a public school system in selected provinces, and by 1897 2,153 primary schools were operating under the auspices of the Catholic Church (Torralba et al. 2007). But this programme was overtaken by the 1896 revolution against the Spanish, which led, following the Spanish-American war, to the transfer of the islands to the USA in 1898.

The Americans employed what they described as a strategy of 'benevolent assimilation', to which the creation of a system of mass education was central. American soldiers of the 1898 annexation force initially acted as public school teachers, until the arrival in 1901 of new recruits from the mainland USA (known as *Thomasites*).⁹⁵ Schools were assigned the goal of 'civilising' native Filipinos while extolling 'American' ideals such as democracy, liberty and civic duties. Education for the native elite, now often culminating in studies at an American (rather than Spanish) university, was designed to ensure effective colonial administration and prepare the country for independence under American tutelage. English became the medium of instruction in schools in 1901, and gradually assumed pre-eminence as the language of commerce, government and the legal system (alongside Spanish until the 1950s). In

⁹⁴ A Barangay Captain assisted by a council is supposed to govern a group of approximately 30–100 families in a barangay system. In most cases, especially in the rural areas, each barangay is comprised of members of an extended family or clan.

⁹⁵ Named after USS Thomas, which transported the first cohort of these American teachers to the Philippines.

1935, partial self-governance was granted with the inauguration of the Commonwealth government,⁹⁶ which saw the first Filipino appointed as Secretary of the Department for Public Instruction.

Meanwhile, the political system introduced by the Americans (inaugurated in 1907 with the election of the first Philippine Assembly) was characterised by weak central government, reliant on the collaboration of local civilian elites and a highly politicised Catholic Church. The landed elite (the descendants of the Spanish *hacendados*) dominated the political arena – a situation that has continued down to the present. American-trained Filipino leaders, largely drawn from this same elite, supported an American model of schooling until independence in 1946, reinforcing the privileged status of the English language. Imposition of the use of the English language and of imported textbooks replete with American narratives, heroes and cultural referents set the stage for what Constantino (1975) describes as the ‘Americanisation’ of Filipino education and the construction of a national identity inoffensive to the colonial masters (Wurfel 1988).

Education during the short-lived Japanese occupation (1942–5) was portrayed by the occupying authorities as a vehicle for enabling Filipinos, along with other ‘Asians’, to recover their independence from the ‘West’, and with it a sense of their ‘Asian-ness’. This vision of Filipinos embracing a regional identity in solidarity with other Asians was reinforced by policies mandating the use of Tagalog (the basis of the current Filipino national language) as the medium of instruction, and the promotion of indigenous literature (Yu-Jose 2004). However, the association of these policies with the occupation itself, and with pro-Japanese propaganda, led to their rapid reversal after 1945. Today, there is glaring lack of scholarly work investigating Filipino discourses on ‘Asianness’ and, at the level of popular culture, a more general absence of attempts to articulate a Filipino identity that emphasises ‘Asian’ linkages. With the exception of the short-lived Japanese occupation, narratives of the Filipino past developed and popularised during the colonial period encouraged identification with religious and political ideals whose reference points were emphatically non-Asian. It has often been observed that ideas of Filipino identity are shaped by an experience of ‘400 years in the (Spanish) convent and then 50 in the (American) brothel’ (Buruma 1996).

In sum, the process of Filipino state formation has been overshadowed by ‘an anarchy of families’, which attempts to transplant an American-style political system merely diverted into new institutional channels (McCoy 1993). Despite the aspirations of the Constitution, national identity formation has been central neither to policies on language of instruction in schools, nor to the development of history and citizenship curricula. Where nationality is explicitly addressed, discussion centres on a vaguely defined ‘Filipino identity’ encompassing relationships with family, a cultural community, a regional political grouping, a global (economic) sphere and life as a minority in a foreign country, but amid all this the lines of any collective civic or ethnic identification with a Filipino ‘nation’ are rather indistinctly drawn.

⁹⁶ The Philippine Commonwealth was established by the Americans with the pre-text of preparing Filipinos for full independence.

Depictions of Filipino identity have focused on aspects of cultural identity mostly in diaspora, literary and cultural studies (e.g. San Juan 2000; Ong 2011; Swift 2011). Ong highlights how London participants in his study used karaoke in community gatherings to connect to a 'collective' cultural identity. He also reveals how participants took pride in the 'positive' Filipino trait of being readily 'assimilated' as immigrants in Western countries. Swift (2011) argues that Filipino seafarers readily embrace a transnational identity fostered by the state-sponsored labour migration strategy. Others analyse national identity debates in the mass media and on the internet (David 2009; Wang 2011), highlighting the role of civic participation in political socialisation at critical historical junctures such as the 'people power' revolutions of 1986 and 2001, and the 1998 centennial celebrations of independence from Spain (Bankoff and Weekley 2002). However, the capacity of these sporadic surges of popular activism to redefine Filipino national identity has been stymied by an ongoing failure to translate such move-ments into systemic political and economic reform. Marcos, at the height of his dictatorial power, attempted to construct a new narrative of Filipino history to address what he perceived as a national 'identity crisis'. He wrote in the *Tadhana*:⁹⁷

My view of our story as a people follows a conceptual framework that considers our earliest ancestors as having participated in man's universal evolution before commencing the particularization process that would, over the centuries, produce a racial identity. From this point follows the development of the Filipino people into a unique and distinct nation . . . the story of a people is not merely a heritage but a destiny.

(1976: viii)

His attempt failed miserably, in part due to extravagantly delusional efforts at self-aggrandisement. He sought to project himself and his wife Imelda as the mythical *Malakas* (Strong) and *Maganda* (Beautiful), figures from pre-colonial legend epitomising Filipino prowess and beauty. His claims to be a highly decorated war hero were meanwhile exposed as a farcical confection. A nineteen-volume tome promoting his vision of history was published (Curaming 2005), but seems to have been patchily distributed, was seldom used in schools and had minimal impact on popular historical consciousness. After Marcos's exile in 1986, it was discarded in the course of a frenzied programme of *de-Marcosification* (Doronila 1992:3). But, to date, no further attempt has been made to produce an officially sanctioned version of the 'Filipino Story'.

On the eve of the 1998 centennial celebrations of independence from Spain, Diokno led a study of the nature of democracy and citizenship in the Philippines (1997). This resulted in a three-volume work featuring contributions from other eminent Filipino scholars, such as Doronila and Zialcita. Their essays reflect an atomised vision of Filipino 'identities' at different levels (within the family, a cultural community and so forth) and locations (local and international), scarcely addressing the practice (or lack of it) of citizenship at a national level.⁹⁸ Where issues of citizenship

⁹⁷ *Tadhana* means destiny and is the title of the nineteen-volume 'Filipino story' authored by Marcos in collaboration with several Filipino historians and writers.

⁹⁸ Segovia's paper (1997) about the conceptualisation of democracy in textbooks features some discussion of the national political and social context, and Doronila's study of literacy programmes among marginalised communities also contains some analysis of the national socio-political background – but these are exceptions.

are explicitly addressed, the focus is generally on grassroots civic activism (through volunteering or participation in anti-corruption non-governmental organisations (NGOs)) and local community development, rather than engagement with national institutions. Discussion of the classic elements used by states to forge a national identity through schooling – a shared heritage, national heroes or suffering and oppression by external foes – is notably absent.

The image of an education system that largely eschewed a nation-building agenda is supported by studies dating from the American colonial period (e.g. Counts 1925, on the medium of instruction); the height of the Cold War (Constantino 1978, on national consciousness); and the aftermath of the 1986 'people power' revolution that toppled Marcos (Constantino and Constantino 1987, on history education; Doronila 1989, on national identity; and Gonzalez 1998, on medium of instruction). Yale professor George Counts first raised the issue of medium of instruction in the Monroe Survey of 1925. He bewailed the teaching of subjects in English, arguing that this sacrificed 'efficiency of instruction in the native tongue' (Counts 1925: n.p.). Succeeding studies would echo such sentiments, often also highlighting the impact of the dominance of English on national identity formation. For example, Gonzalez (1998) notes how participants in a national language survey dismissed the need for a common language of instruction (other than English) to promote national identity in schools.

While forging a strong national consciousness has been consistently flagged as a key aim of government – in Constitutions, Republic Acts, Executive Orders and Presidential Decrees – the evidence is that such rhetorical declarations have had limited practical impact. Below we explore how post-independence governments have repeatedly instigated citizenship education programmes, but largely failed to ensure their implementation in school curricula.

3. 0 Citizenship education programmes

Spanish colonial education policies, as noted above, were geared mainly to the training of loyal colonial subjects. When public primary schooling was finally introduced in 1863, it centred on instruction in basic numeracy and, especially, literacy – sufficient to enable pupils to study the Bible and learn their catechism (Constantino 1978). Secondary schooling was available only for students of Spanish descent. As the nineteenth-century French traveller La Perouse commented, 'the only thought was to make (Filipinos) Christians and never citizens' (cited in Constantino 1978: 33). Access to education was a major popular demand by the time of the American conquest, enabling the new colonisers to assume the mantle of benevolence when they established a universal public school system in 1901. However, the choice of English as the instructional medium signalled the beginning of what Constantino terms the 'miseducation' of Filipinos:

The use of English as a medium of instruction made possible the introduction of an American public school curriculum. With American textbooks, young Filipinos began learning not only a new language but also a new culture. Education became miseducation because it began to deFilipinize the youth, taught them to regard American culture as superior to any other, and the American society as the model par

excellence for Philippine society. These textbooks gave them a good dose of American history while neglecting their own.

(1978: 66)

There is general recognition of the success of the American strategy of using education to transform Filipinos into model colonial subjects. This was predicted in 1901 by an eager supporter of the American occupation, Trinidad Pardo de Tavera, who was eventually appointed to the Philippine Commission.⁹⁹ Writing to General Arthur MacArthur (father of Douglas) in 1901, Tavera implored:

After peace is established, all our efforts will be directed to Americanizing ourselves, to cause a knowledge of the English language to be extended and generalized in the Philippines, in order that through its agency the American spirit may take possession of us, and that we may so adopt its principles, its political customs, and its peculiar civilizations that our redemption may be complete and radical.

(cited in Constantino 1978: 67)

The embrace by the collaborationist elite of this mission of Americanisation anticipated the citizenship-formation agendas of later post-independence governments, as elucidated below. American ideals of individual choice, democracy and capitalism have remained major hallmarks of all subsequent official articulations of the rights and duties of the citizen.

The earliest citizenship code for Filipinos was Apolinario Mabini's patriotic manifesto,¹⁰⁰ *The True Decalogue*, published in the brief interregnum between the end of Spanish rule and the arrival of the Americans. Five of the manifesto's ten precepts stipulated the qualities expected of national citizens:¹⁰¹

- IV Love your country more than yourself, for this is the patrimony of your race, and the hope that you will bequeath to your children.
- V Put your country's well-being before your own, for its happiness will likewise be yours and your family's as well.
- VI Strive for your country's independence, for only you can have any real interest in its advancement, and your own liberty depends on its being free.
- VII Do not recognize in your country the authority of any person whom the people have not elected, for authority comes from God and God speaks through the conscience of every man.
- VIII Build a republic, never a monarchy, for a republic makes a people noble and worthy, while a monarchy exalts only one or a few families and builds a dynasty.

⁹⁹ The US president created the Philippine Commission in 1901 to perform legislative and (limited) executive powers in the administration of the Philippine colony.

¹⁰⁰ Mabini is oftentimes credited as the 'brains' of the wars of independence against Spain and the US. A great thinker and political philosopher, he also authored the Constitution of the first Philippine Republic. He was the leading adviser of Emilio Aguinaldo and was President of the Council of Secretaries and the country's first Foreign Affairs Minister.

¹⁰¹ These are abridged versions of articles 4–8 of *The True Decalogue* by Randy David (2009). Mabini prescribed these 'ten commandments' to advance the cause of Filipino patriotism and they were published with the Malolos Constitution in 1898.

However, this was never translated into state policy or educational practice because of the outbreak of the Filipino-American war in 1899, and the subsequent establishment of American colonial rule.

The next official attempt to prescribe a code of civic ethics occurred during the Commonwealth period (1935–46), when Manuel Quezon issued a 'Code of Citizenship and Ethics' (Executive Order 217 s. 1939), which stressed the importance of developing moral character, personal discipline, civic conscience and awareness of the duties of citizenship. The decree underlined the importance of: (1) faith in the role of Divine Providence in guiding the nation's destiny; (2) love of and respect for country and family; (3) sacrifice to the nation and respect for the Constitution; and (4) the ideal of the law-abiding and taxpaying citizen, the entire document being suffused with a very Catholic emphasis on cultivating personal morality while rendering 'unto Caesar that which is Caesar's'. The vision this reflected was of a citizenry obedient to established authority, rather than actively engaged in its own governance, and the Code seems to have spurred no drive to reform educational practice.

Following the Second World War, successive Filipino leaders have proclaimed the need for concerted programmes of citizenship formation, for the 'moral renewal' of the government bureaucracy and for a stronger sense of national identity among ordinary citizens. The first post-independence president, Manuel Roxas (1946–8), remained under close American tutelage, and his administration witnessed no significant changes to the status quo – in education or more broadly. The later 'Filipino First' policy of President Carlos Garcia (1957–61) focused primarily on economic reform and foreign trade and involved no significant strengthening of schooling's role in political socialisation. Ferdinand Marcos (1965–86) was the first post-colonial president to embark on any serious attempt to use education for the purpose of forging a strong national identity. In his 'New Society' experiment, he highlighted the need to develop a new brand of citizenship for Filipinos. He decreed in 1972 that 'education [should] be trans-formed so that it can become an instrument for the economic and social transformation of the country' (Clarke 1977:61), and the Education Act of 1982 underlined the importance of promoting a strong and unified sense of nationhood:

Section 3. Declaration of Basic Policy – It is the policy of the State to establish and maintain a complete, adequate and integrated system of education relevant to the goals of national development. Toward this end, the government shall ensure, within the context of a free and democratic system, maximum contribution of the educational system to the attainment of the following national developmental goals:

- 1 To achieve and maintain an accelerating rate of economic development and social progress;
- 2 To ensure the maximum participation of all the people in the attainment and enjoyment of the benefits of such growth; and
- 3 To achieve and strengthen national unity and consciousness and preserve, develop and promote desirable cultural, moral and spiritual values in a changing world.

However, like many official initiatives before and since, this remained largely confined to the ethereal realm of policy discourse. The most significant legacy of Marcos's dictatorship with respect to citizenship formation was the institutionalisation of his policy to export Filipino labour, resulting in an enormous and on-going 'brain drain' that has effectively transformed the Philippines into an 'emigration state' (Ruiz 2007). Indeed, successive post-Marcos governments have sought to give the phenomenon of mass emigration a positive gloss as part of efforts to foster a coherent vision of Filipino identity. After Marcos was exiled in the aftermath of the bloodless EDSA revolt in 1986, in which the Catholic Church played a key role, his successor, Corazon Aquino (1986–92) called for a 'social revolution' to rebuild the nation. The period 1988–98 was declared the 'Philippine Decade of Nationalism'. As part of this presidential programme, the then Department of Education, Culture and Sports (DECS) launched an initiative grandly entitled 'Social Transformation through Education'. This was followed in 1988 by a National Moral Recovery Program (NMRP), promulgated by the Philippine Senate. This flurry of governmental activity witnessed the introduction in 1988 of a new compulsory school subject, Values Education, to be taught from elementary to high school level. However, the curricular focus was once again primarily on individual morality, emphasising 'social reform through the inner transformation of the individual' (Quisumbing 1994: 3). DECS Order No. 6 of 1988 (*Values Education for the Filipino*), which spelt out the goals of the programme, consisted mainly of a list of desirable individual virtues: love of God, charity work, volunteerism and so forth. This built upon established approaches rooted in religious and moral education, evincing the strong and continuing influence of the Catholic Church. It reflected a longstanding emphasis in the ethics and morals curricula of public elementary schools on instruction in 'good manners', 'right conduct' and 'character building' (Quisumbing 1994: 5).

The NMRP was continued by Aquino's successor Fidel Ramos (1992–8).¹⁰²In 1992, he issued a decree similar to that promulgated sixty years earlier by Quezon, after the report of a Senate Task Force called for the development of a sense of patriotism and national pride, or '*pagmamalaki sa bansa*' – a genuine love, appreciation and commitment to the Philippines and things Filipino. Proclamation No. 62 alluded to: 'the need for moral renewal in order to eradicate the social ills that have plagued us for the past several decades, such as graft and corruption, patronage politics, apathy, passivity, mendicancy, factionalism and lack of patriotism'.

But it was also during Ramos's presidency that the school subject of Social Studies began to include topics focusing on transnational identity, migrant labour and global citizenship. The tension between the NMRP's nation-building agenda and the simultaneous celebration of migration, global citizenship and the heroism of OFWs continues to this day.

In 2001, in the aftermath of yet another bloodless uprising (backed by much of the established elite) to remove another extravagantly corrupt leader, Joseph

¹⁰² Fidel Ramos was one of the military leaders who abandoned Marcos in the EDSA 1986 military-led uprising, which resulted in the accession of opposition leader Corazon Aquino to the presidency. His sister, Senator Leticia Shahani, was the lead convenor who initiated the National Moral Recovery Program in 1988.

Estrada, citizenship education was incorporated in a new *Makabayan* subject introduced by the administration of Gloria Macapagal-Arroyo (2001–10).¹⁰³ The title of this subject literally means ‘Patriot’, but it encompasses values education more generally, and formed a core learning area in the new Basic Education Curriculum (BEC) of revamped DECS (now Department of Education). *Makabayan* was designed to develop socio-cultural and politico-economic literacy, with the aim of ensuring that every Filipino learner would acquire a ‘healthy personal and national self-concept, founded upon adequate understanding of Philippine history and a genuine appreciation of local culture, crafts, arts, music, and games’. Further, the new subject was tasked with promoting ‘a constructive or healthy patriotism, which is neither hostile nor isolationist towards other nations’, as well as ‘appreciation of global interdependence’ (Mendoza and Nakayama 2003: 15). To date, few studies have attempted to investigate the impact of *Makabayan* on young Filipinos’ civic or political consciousness. However, as early as 2003, Mendoza and Nakayama highlighted the failure of the programme to strengthen geographical literacy – or basic knowledge of the extent and nature of the national territory. More recent evaluative studies have focused on implementation issues, criticising a lack of teacher training and a complex grading system, among other problems (Bernardo and Mendoza 2009). Meanwhile, President Arroyo decreed in 2002 the introduction of a National Service Training Program (NSTP)¹⁰⁴ at tertiary level, a measure intended to cap a comprehensive citizenship education programme extending from elementary school to college. However, assessments of the effectiveness of these programmes are not yet available.

The new K+12 statement of curriculum goals,¹⁰⁵ promulgated in President Benigno Aquino’s June 2013 Republic Act (RA) 10533, is thus the latest in a very long line of proclamations asserting the need for stronger citizenship education. However, close scrutiny of the broader policy context suggests that citizenship formation is by no means central to the priorities of the -current administration. The statement portrays education primarily as a tool for individual advancement rather than for promoting identification with and commitment to the broader cause of national development (Maca and Morris 2012). This is highlighted in Section 2 (*Declaration of Policy*):

it is hereby declared the policy of the State that every graduate of basic education shall be an empowered individual who has learned, through a program that is rooted in sound educational principles and geared towards excellence, the foundations for learning throughout life, the competence to engage in work and be productive, the ability to coexist in fruitful harmony with local and global communities, the capability

¹⁰³ *Makabayan* as a learning area was introduced from 2001 and was a result of the amalgamation of other subjects: (1) Social Studies, (2) Technology Livelihood and Home Economics, (3) Music, Arts, Health and Physical Education and (4) Values Education.

¹⁰⁴ The NSTP is a programme aimed at enhancing civic consciousness and defence preparedness in the youth by developing the ethics of service and patriotism while undergoing training in any of its three programme components: (1) Reserve Officers’ Training Corps (ROTC), (2) Literacy Training Service and (3) Civic Welfare Training Service. Created by virtue of RA 9163, Section 2 declares:

Recognizing the youth’s vital role in nation-building, the State shall promote civic consciousness among the youth and shall develop their physical, moral, spiritual, intellectual and social well-being. It shall inculcate in the youth patriotism, nationalism, and advance their involvement in public and civic affairs.

¹⁰⁵ The K+12 programme aims to transition the system from a ten- to twelve-year cycle. Part of the policy reforms includes overhauling of the social studies curriculum, especially the mainstreaming of ‘local history’, and implementing mother tongue-based multilingual education (MTB-MLE).

to engage in autonomous, creative, and critical thinking, and the capacity and willingness to transform others and one's self.

(Republic Act 10533)

While the policy ostensibly puts learners at the centre of educational reform, its fundamental premise is that educated Filipinos (at home or abroad) will contribute to national development through pursuing their individual self-interest. The reform is silent with regard to the role of the curriculum in developing a Filipino national identity. Goals such as fostering national cohesion, patriotism, love of country and the rule of law have so far been absent from statements of the aims of the K+12 reform, which are permeated with neoliberal language of 'skills' and 'competitiveness' typical of Organisation for Economic Cooperation and Development (OECD) discourse on educational 'excellence', and further promoted by key NGOs and donor agencies (notably USAID). As of 2014, the K+12 *Araling Panlipunan* (Social Studies) curriculum, which encompasses history and citizenship education, is still being finalised by the Department of Education (DepEd).¹⁰⁶

Meanwhile, as already mentioned, portrayals of the model citizen in curricula since the 1990s have increasingly celebrated the contribution of migrant workers. In 1998, there were approximately 7 million Filipinos working overseas, making the Philippines one of the world's largest exporters of labour (and numbers have since risen further). By that time, the Ramos government had installed migrant labourers in the pantheon of national heroes, portraying their contribution in terms previously reserved for anti-colonial liberators. They were hailed for liberating millions of Filipinos from poverty with their billions of dollars in remittances, crucial for keeping the national economy afloat. A UNESCO-commissioned textbook review noted how 1990s' Social Studies textbooks highlighted the positive traits required of Filipinos aspiring to work overseas (Diaz 2000). A bestselling grade 2 textbook declared: 'Filipinos are good people. They are loving and thoughtful. They are fun loving and friendly. They are industrious and persevering. Filipinos are truthful and helpful' (Danao 1999: 114).

Textbooks also cite migrant role models as exemplars of Filipino -'progress', often noting the accolades such individuals have received abroad: examples from a 2000 text included Lea Salonga (Broadway theatre actress), Rafael Nepomuceno (bowling world champion), Cecil Licad (internationally renowned pianist) and Lydia de Vega (formerly Asia's sprint queen) (Diaz 2000: 36). In the popular Social Studies textbook by Zaide and Zaide, OFWs are hailed as global citizens, ambassadors of international goodwill and even as 'ideal' Christian missionaries (especially in Asia):

the Filipinos now make the ideal Christian missionaries because: 1) Filipinos are more acceptable than Western missionaries to spread the Gospel to other Asian countries, and 2) Filipinos are adaptable – they can mingle with any other nationality and even live abroad.

(2010: 241)

¹⁰⁶ A review of learning goals of the social studies learning area across grade levels will reveal how national identity formation will be addressed in the new curriculum. While that is an exciting prospect, publication limitations prevented us from completing such curriculum review.

Studies of migrant Filipinos have observed that, in the search for economic opportunity, many do indeed consciously adopt a 'transnational identity' (Zialcita 1997; Ong 2011). Many readily embrace the norms and values of their temporary or adopted homelands, often demonstrating significantly higher levels of obedience to the rule of law and active practice of civic duties than when they were still in the Philippines – suggesting a tendency to live up (or down) to the behavioural expectations they perceive as characterising whichever society they happen to inhabit. Even Filipino seafarers, contrary to stereotypical views of sailors, enjoy a reputation as relatively 'good global citizens' (Swift 2011). The Philippine state has recently made efforts to engage overseas Filipinos more fully in national life, most importantly with the passage of the Overseas Absentee Voting Law in 2003. Education has become a major tool in promoting this economic conception of global citizenship (Oxley and Morris 2013). One of the many slogans of the DepEd says it all: '*Bawat graduate, bayani at marangal*. [Every graduate is a hero and is honourable].' However, with stubbornly high graduate unemployment at home, most graduates are still forced outwards into the migrant labour market, which has remained central to the trade and foreign policy agendas of all post-Marcos governments (Maca and Morris 2012).

4.0 History and identity

History education in schools is one of the primary curricular instruments through which states attempt to construct a shared sense of national identity. This has commonly involved the provision, through schooling, of a national historical narrative (often mythical and highly selective) highlighting elements such as shared ancestry, national heroes, common foes and collective suffering. Within such narratives, wars with malevolent foreign powers, and the experience of (and resistance to) colonisation, often constitute raw materials for the construction of national myths. Nation-building projects have been sharpened by neo-Darwinian conceptions of international- relations and racist notions of nationhood, still strongly influential in East Asia, to an extent perhaps no longer true of regions such as post-Holocaust Europe, which has witnessed concerted official and grassroots efforts at international reconciliation (Vickers 2005).

Within East Asia, the Philippines is distinctive in this respect, with various studies demonstrating little consciousness of national history as a shared struggle for liberation, and a tendency instead to portray colonisers, especially America, as benign paternalists (Constantino 1978; Wurfel 1988; Doronila 1989). Doronila found that the majority of Filipino schoolchildren expressed a preference for assuming a different nationality if given the chance. Overall, students ranked the Philippines third after Japan and the US as the country they admired most or wanted to live in.

The weak sense of national history is perhaps partly attributable to the marginal status of history as a school subject. It is taught in only one year at the elementary level (fifth grade), and shares the *Makabayan* (Patriotic) subject (grades 1 to 3) with various other curricular themes: civics and culture, geography, music and the arts, health education, home economics, and good manners and proper conduct. In upper

elementary school (grades 4 and 6), it is again just one component of the *Hekasi* subject, which also comprises Geography and Civics. A review by Diokno (2009) of fifty-four units in the grade 6 Social Studies textbooks reveals that only three deal with history, occupying a total of fourteen pages. The emphasis in this subject is on the promotion of civic values such as *bayanihan* (communal unity or work, and volunteerism). Diokno's study indicts the failure of the Social Studies programme to inculcate national identity, noting that lessons do not convey a sense of Filipinos' 'shared history' as a people. The review of grade 3 textbooks, for example, reveals that 'all the civic values are illustrated in fictional, situational stories', despite the fact that history could supply more interesting material, more persuasive insofar as it draws on real experiences. The on going depoliticisation of textbook historical narratives can perhaps be traced in part to the banning from schools of Jose Rizal's novels at the behest of the Roman Catholic hierarchy in 1956 (Maca and Morris 2013). Rizal inspired the 1896 revolt against the Spanish and was critical of the Catholic Church, which he saw as the spiritual arm of colonialism. Now, as in the 1950s, powerful interests in Filipino society remain uncomfortable at the prospect of casting the curricular spotlight too intently on national history – preferring to relate citizenship to abstract moral (or religious) principles.

Textbook portrayals of Americans as 'accidental colonizers' (Constantino 1982) continue to this day (Diokno 2009), reinforced by officials' reluctance to countenance substantive coverage of the anti-American war of liberation (1899–1902) because they found it 'too violent' (del Mundo 2007). Other 'violent' episodes accorded minimal coverage include the 100-year revolt against Spain, the anti-Japanese guerrilla struggle, and even Filipino participation in the Korean War. Textbook accounts of the Japanese occupation feature extended coverage of America's liberation of the country, but little discussion of the Filipino guerrilla resistance, in which Communists played an important role (Yu-Jose 2004; Maca and Morris 2013). When local guerrillas are mentioned they are typically described as bandits. In a classic study of history textbooks, Constantino criticised the treatment of colonialism and conquest:

Conquest is not presented as *ab initio* wrong and immoral, the deprivation of a people's right to freedom through the use of treachery and superior force. (Exception is made in the case of the Japanese who had the temerity to take the Philippines away from the Americans. That conquest was wrong.) There is no explanation of colonization in terms of the economic self-interest of either the Spaniards or the Americans. Instead, both appear to have stumbled into colonization without meaning to.

(1982: 27)

Constantino (1982) also notes 'how the arrival of each colonizer is celebrated with a long list of the good things we learned from him' (p. 28). Textbooks often recount how the 'ethnic stock' of Filipinos benefitted from colonisation. Examples of how social studies textbooks emphasise Filipino 'indebtedness' to the Spanish and American colonisers, are cited by Mulder:

As long as we Filipinos remain Christians we shall always remain indebted to Spain. Christianity is Spain's most lasting heritage to our people. Christian virtues have elevated our way of life and our ideals. The Spaniards enriched our culture. By absorbing the best and the beautiful of Spanish culture, we have become the most

socially advanced of the Asiatic peoples who have shaken off western rule. We have learned much of the sciences, arts, and letters from the Spaniards.

(Leogardo and Navarro 1974; cited in Mulder 1990: 90)

We are forever indebted to [America] for our democratic system of government and laws. Because America trained us in self-government, the Philippines has become the outpost of democracy in the orient . . . The American occupation brought about material prosperity never before enjoyed by our people. The standard of living was improved. The Filipinos took to the American way of life as ducks took to water. The Filipinos became Americanized and were proud of it.

(Alcala *et al.* 1986 cited in Mulder 1990: 90–1)

This ‘positive’ portrayal of the country’s colonial history has continued to this day and is best exemplified by Zaide and Zaide’s (2010) popular grade 5–7 history textbook, used mostly in private schools attended by the elite. The account of the Philippines’ wars of revolution is glossed by a summary of the ‘historical values’ to be derived from studying these violent independence struggles, as compared with the establishment of the Philippine Commonwealth through the mediation of a benevolent colonial master:

Most Filipinos preferred the peaceful and non-violent campaign for independence. In the 1930s, our politicians united and got semi-independent government and a law to ensure full independence. This peaceful movement for reform – with all leaders united – was very successful. *It was more successful than the [1896] Philippine revolution [against Spain], the war for independence [against the US], the peasant revolts, and the communist party [movement].*

(153; emphasis added)

5.0 English as a medium of instruction

The Philippines has a multi-ethnic population with almost 170 living languages. However, from independence in 1946 until 2012 the country’s languages-in-education policy recognised English and only one indigenous language, a Tagalog-based ‘Filipino’. After decades of political lobbying (and a prolonged struggle against separatist insurgents in the south), this policy was officially revoked in 2012 with the implementation of mother tongue-based multilingual education (MTB-MLE) under the new K+12 curriculum. The drawn-out controversy over language in schools is partly attributable to the failure to fully develop any of the indigenous writing systems, such as the *alibata*, that existed prior to the archipelago’s colonisation. Spanish missionaries forced Filipinos to adopt the Roman script (Doronila 1995) and described the indigenous Filipino alphabet as the work of the ‘devil’, burning indigenous literature (Doronila 1996). Spanish was used in convents and seminary schools attended by the children of the elite. Meanwhile, the friars deliberately refused to teach Spanish to those of a humbler background, for fear that this might stoke rebellion by affording unmediated access to liberal ideas current in the Spanish-speaking world (Schumacher 1973 in Gonzales 1998).

The language problem persisted with the decision of the American colonial government in 1901 to require the use of English as the only medium of instruction. Bernardo (2004) describes this as part of America's strategy of 'benevolent assimilation'. Both pre-war and post-war scholarship has pointed to the dominance of English as an impediment to the attainment of functional literacy for many Filipinos (Saleeby 1924, in Constantino 1982; Counts 1925; Hunt and McHale 1965; Clarke 1977). Successive constitutions in 1935 and 1943 called for the development of a common national language based on the various languages of the islands, but no practical measures resulted. In the 1973 Constitution, Tagalog was declared as the 'Filipino' national language. This pronouncement was accompanied by acrimonious debates and protests, with claims that the law favoured one ethno-linguistic group over various others (Luzares 1981). Resentment towards a legislated 'national language' has persisted, and in 1980 Gonzales declared:

The Filipino is once more in search of a common national language, a linguistic symbol of unity and solidarity, for the choice made for him by his leaders divided rather than united. Presently, he can at least live comfortably with a pragmatic and aspirational symbol, Filipino, a word with a sense but with no clear reference.

(47)

Even when Marcos decreed a bilingual policy (use of English and Filipino) in 1974, a measure subsequently enshrined in the post-Marcos Constitution of 1987, this issue remained unresolved. Gonzalez (2000) has portrayed this bilingual policy as just another exercise in transactional politics designed to protect the status quo and the interests of (overwhelmingly English-medium) private schools. In 2003, President Arroyo decreed English as the only medium of instruction at all levels of education, sparking a furious controversy. Arroyo, herself closely associated with the international financial industry, was supported in this move by pro-business congressmen as well as local and foreign chambers of commerce. In 2007, a coalition of these groups issued a strong endorsement of the use of English as the only medium of instruction from primary level, on the grounds that this would benefit the call centre industry. But the reform was strongly opposed by academics, educators and a number of civil society activists, who argued that it was not appropriate for a multilingual and multi-ethnic society like the Philippines. For example, Ocampo (2007) opined that the knee-jerk reaction by Congress to fill up the projected quotas of business process outsourcing (BPO) organisations, such as transcription and call centres, would put Filipino children at a learning disadvantage. The longstanding controversy over medium of instruction policy has been aptly summarised by Bautista *et al.*:

For over 80 years, the recommendation to use the native . . . , local . . . , mother . . . or the child's . . . language in schools (in the early years) as the medium of learning has been consistently disregarded. From the 1920s to the present, the political pressures exerted by different sectors and advocates in the name of national unification, global participation, regional identity, cultural integrity, or economic progress and overseas employment caused the policy decision-making on the language issue to swing from one extreme to another.

(2008: 20)

The recent signing of the K+12 organic law (Republic Act 10533) mandating the Department of Education to institutionalise mother tongue-based multilingual education is intended to resolve this festering linguistic dispute. However, as with most education reforms over the past century, implementation will require strong political will, given powerful opposition from sectors that continue to view English proficiency as an 'advantage' in the BPO industry and as an indispensable tool for facilitating labour migration.

6.0 Summary and conclusion

In this chapter, I have focused on the nature of national identity policies and practices in three areas of schooling: civics, history education and the medium of instruction. I have shown how the state has promoted a vision of national identity that reflects and sustains attitudes of colonial dependency, while sporadically declaring a need for education to foster a strong sense of commitment to the Philippines. However, insofar as they were intended to serve more than a symbolic purpose, such declarations of intent have been largely thwarted by strong sectional interests or the state's own limited capacity. The outcome has been that citizenship and history education, as well as linguistic policy and practice, have contributed to the maintenance of a relatively fissiparous or underdeveloped sense of Filipino nationhood.

Ever since the country's independence from America in 1946, studies have consistently highlighted the relative weakness of national identity consciousness in the Philippines. As Jose Rizal lamented more than a century ago, 'a man in the Philippines is only an individual, not a member of a nation' (Majul 1999: 9). This has been attributed to the failure to establish a strong modern state after almost 400 hundred years of colonial rule. The post-independence Filipino state is largely a family enterprise dominated by a landed and political elite with roots in the Spanish-era plantation economy, subsequently co-opted by the Americans. The entrenched power both of this landed oligarchy and of the Catholic Church has sapped the will and capacity of the state to promote a vision of the Filipino citizen as an active, autonomous agent in his or her own development and that of the country as a whole. A neo-colonial relationship with the United States has underpinned enduring economic and strategic dependency, but perhaps more fundamental to the stunting of Filipino democracy has been the way in which colonialism, among other factors, has sustained an indigenous elite largely detached from the experience and interests of the mass of its fellow citizens.

In this respect, comparisons can perhaps be drawn between the post-colonial experience of the Philippines and that of India, where – as Barrington Moore argued in the 1960s – the lack of a broad-based social revolution meant continuing domination of post-independence democratic institutions by an entrenched, feudalistic caste (or castes) of rent-seeking elites (Moore 1966). In India too, enormous ethnic and linguistic diversity- has facilitated the continuing dominance of English as the *lingua franca* of national elites, which in turn exacerbates the gulf between the latter and the mass of the population, for whom regional, caste or religious identities are often more important than Indian

nationalism. And, as in the Philippines, so in parts of India (especially in the south), economic stagnation and widespread English-medium education has fuelled large-scale labour migration – a safety valve that relieves pressure on the state to address serious institutional dysfunction. But, in common with Indonesia and Indochina, India's transition to independence followed a prolonged anti-colonial struggle, the memory of which has been manipulated to underpin the legitimacy of the post-colonial state, and of its governing elites. In the Philippines, by contrast, neither the state nor the elites that populate its institutions derive legitimacy from a record of anti-colonial heroics.

In the Philippines, then, the accomplishment of the transition from colonialism to independence without violent disruption of the existing social order is linked to elite reluctance to articulate a strong, unified sense of anti-colonial nationalism, or to promote a vision of active, engaged democratic citizenship. However, while the consequent weakness of political cohesion and state effectiveness has seen the Philippines 'fall behind' its East Asian neighbours in developmental terms, it has also meant comparative freedom from the chauvinist tendencies, state-induced ideological insanity, or aggressive, expansionist bent that nationalism has encouraged elsewhere in the region (in fascist Japan, Maoist China, the two Koreas or Pol Pot's Cambodia, for example). The current maritime disputes in the South China Sea highlight this point, but confrontation with a rising China may, in addition to driving the Philippines back into the American embrace, also spur a more forceful and coherent sense of shared threat and shared destiny among Filipinos. If so, this will perhaps prove a mixed blessing.

Chapter 6

National identity formation and the portrayal of the Japanese occupation in Filipino textbooks¹⁰⁷

Abstract:

The preceding chapter analyzed citizenship education programs (and curricula) across different eras: from the 'revolutionary' period in 1896-98 to the Aquino administration of 2010-2016, and suggested that citizenship education programs in general, and history as a school subject in particular, have failed to develop a sense of shared national identity. The current chapter further highlights the depoliticized approach to history education wherein narratives of Spanish colonization were filtered by Catholic scholars, whilst the Americans were still portrayed as benign liberators rescuing the country from Spain and Japan. It highlights the rather aberrant portrayal of the Japanese occupation in Filipino official discourse (i.e. school textbooks). Whilst some other East Asian countries continue to portray the Japanese as a threatening 'Other,' Filipinos tend to highlight good post-war relations with Japan, highlighting economic cooperation, international aid, reconciliation, and Filipino internationalism or 'global citizenship.'

1.0 Introduction

The Philippines has been occupied three times, but the dominant narrative of the Spanish colonization has always been filtered by Catholic scholars, while the Americans have consistently been portrayed as a benign visiting power that liberated the country first from the Spanish, and then from the Japanese. As part of this selective and depoliticized approach to their national history, pupils are taught little about the war of liberation fought against the Americans from 1899 to 1902, and discussion of the critical views of the national hero (who inspired the war of independence against the Spanish) towards the Catholic Church has generally been avoided. In marked contrast, the Japanese, who occupied the Philippines from 1942 to 1945, are portrayed as brutal invaders and aggressors. Nevertheless, the portrayal of the period of Japanese occupation has not been used to create a 'historical narrative' focused on constructing a unified sense of Filipino national identity.

The Philippines at the peak of its economic growth in the early 1960s was described as harbouring the 'worst feelings against Japan' of any of the countries subjected to Japanese invasion and occupation during the war (Nakano 2010:5), and was particularly critical of Japan's readmission to the international community. However, this official stance changed significantly from the 1980s, as Japan's apology for its wartime atrocities in 1983 opened the way to improved diplomatic relations between the two countries (Nakano 2010:6) and increased economic aid from Japan. A

¹⁰⁷ An earlier version of this chapter was published in 2013 with Prof. Paul Morris (UCL-IOE, London) in an edited volume, *Imagining Japan in Postwar East Asia* (Routledge) by Paul Morris, Naoko Shimazu and Edward Vickers, pp. 229-248.

Washington Post article published during the 1986 state visit of the newly installed President Corazon Aquino reported that Emperor Hirohito 'kept apologizing for [the suffering] the Japanese caused the Philippines' while Mrs Aquino told him 'to forget about this' (Nakano 2010: 6). This shift in the nature of Filipino-Japanese relations is partly explained by the reversal in the economic fortunes of these former foes. The strong anti-Japanese sentiment among Filipinos was only sustained until the 1960s, when the Philippines was the second largest Asian economy. The steady economic decline of the Philippines from the 1970s, and the rise of Japan as an economic and political powerhouse in the region, saw relations between the two countries increasingly characterized by a 'politics of reconciliation and forgetting' on both sides (Nakano 2010).

Ever since the country's independence from the United States in 1946, the teaching of the Philippines' extended colonial history in the school curriculum has been a contentious and polarizing issue. Bitter partisanship has frequently surfaced among groups defending and opposing the generally uncritical portrayals of Spain and the United States in the country's history. Many critical scholars have argued that the portrayals of the former colonial powers are inaccurate, contribute to a weak sense of national identity, and reflect a continuing pattern of dependency. Defenders of the status quo argue that the orthodox narrative is broadly accurate and reflects the more humanitarian, global, and peace-loving orientation of the curriculum. Evidence as to the weak sense of national identity among Filipinos is provided by studies that show that students would prefer to become American or Japanese nationals (e.g. Doronila 1989). Similarly, Constantino (1978) argues that generations of Filipinos were only weakly socialized as national citizens. Diokno's (2009) more recent evaluation of the current Social Studies curriculum criticizes its continuing failure to develop goals related to patriotism, nationalism, and citizenship. She also highlights the poor quality of textbooks and ineffective teaching-learning strategies. In the meantime, educational leaders claim that these past mistakes in history teaching will be addressed in the ongoing review of the curriculum for Grades 4–7, starting with the mainstreaming of 'local history'.

This chapter investigates the portrayal of the Japanese in school textbooks in the Philippines and notes how this contrasts with the portrayals of the other external powers that have occupied the country. We initially draw on earlier research on the content of the school curriculum and then analyse the current situation. We argue that, while textbooks have portrayed the Japanese occupation as especially brutal, in the Philippines – in marked contrast to most other East Asian societies – images of Japanese derived from the period of occupation have at no stage been incorporated into a coherent narrative designed to create a sense of Filipino national identity. Accounts of Japanese brutality have, however, served to cast the record of Spanish and American colonization in a relatively benign light, deflecting the focus of historical studies (at least among schoolchildren) away from a more generalized critique of the country's colonial inheritance.

2.0 Philippine history in the curriculum

The Philippines' national curriculum is defined by a list of learning competencies produced by the government. Here, we look especially at the 2010 Basic Education

Curriculum-Philippines Education Learning Competencies. The history of the Philippines is taught at junior level via two subjects: as part of Social Studies in Grades 4–6, and in Grade 7 (or 1st year high school) as a subject entitled Philippine History. In this chapter, we focus only on the books used for Grades 4–6 Social Studies, as it is here that the principal coverage of the Japanese occupation is provided. In the Social Studies curriculum, the ‘learning units’ follow the traditional periodization: precolonial (before 1521); Spanish colonization (1521–1898); American occupation (1899–1946); Japanese occupation (1942–1945); and the independent Philippines (1946 onwards). The Japanese occupation is usually covered as a distinct chapter in the textbooks, but is sometimes discussed within a section dealing with the WWII period of the American colonial government.

There are no official History or Social Studies textbooks prescribed by the government. The Marcos government tried to create a ‘national historical narrative’ (the 19-volume *Tadhana: The History of the Filipino People*), which Marcos, in collaboration with a number of prominent historians, authored himself (and in which his role as a national hero was highlighted) (Curaming 2005). This was discarded after his exile in 1986. Since 1995, while textbooks remain obliged to follow the national curriculum, they are mainly published by private groups. The Department of Education (DepED) does publish school textbooks itself, but these are authored by private writers who are commissioned by the government. Most are usually of poor quality and contain highly contentious ‘historical interpretations’ (Lontoc 2007; Diokno 2010). A key topic that has been contentious is the portrayal of the Filipino-American war, which is usually downplayed as a minor insurrection and omits any reference to the policy of ‘benevolent assimilation’, which was the strategy that underpinned the US occupation. Schools can choose which textbooks to use and the most popular ones in Social Studies and History are authored by the historian Gregorio Zaide. It is one of these that we analyse later in the present chapter: the 6th edition of the textbook *Philippine History and Government*.

3. 0 Production and use of textbooks

The production and use of textbooks in the Philippines is therefore highly deregulated. The Department of Education (DepED) is supposedly the one agency tasked with regulating the school textbook industry. However, decentralization of textbook production, procurement, and distribution occurred in 1995, when the regulatory powers of the DepED over the privatized publishing industry were strongly curtailed (Lontoc 2007; Reyes 2009). This was the result of the implementation of the Book Publishing Industry Development Act, the main rationale for which was the perceived efficiency of free market competition for textbook production in private schools. As a result, currently only textbooks used in public schools remain under the (weak) control of the DepED.¹⁰⁸ Each private school in the country may prescribe, or even produce, its own textbooks. Overall, approximately 10 per cent of elementary schools and 20 per

¹⁰⁸ However, this was just an aftermath of earlier decisions to curtail the powers of the central government. The precedent against strong government regulatory powers over the education sector was set by the landmark 1993 Supreme Court decision against the mandatory school-leaving examination, the NCEE (National College Entrance Examination). The national test was abolished because of the private school sector’s lawsuit against government control on college admission, which was contrary to the constitutional guarantee of academic freedom.

cent of high schools, and until the early 2000s, almost all preschools have been categorized as private, and generally these institutions tend to be more prestigious and popular with parents.

The only role the DepED retains with regard to textbooks is that of vetting 'manuscripts' to determine whether they follow the national curriculum. However, the system is full of loopholes (Lontoc 2007 ; del Mundo 2007 ; Diokno 2010). For example, the DepED's guidelines for textbook writers focus on the mechanics of publishing (camera-ready, prescribed number of pages, etc.) and are devoid of standards and criteria for actual content (Hornedo et al. 2000). At minimum, textbook content should be aligned with the learning competencies outlined by the DepED. But this weak state control and regulation of textbooks poses risks as to the kind of knowledge transmitted to both pupils and teachers. In the absence of a tightly defined set of guidelines from the DepED, it is the textbooks that effectively define the curriculum, as a group of textbook evaluators highlight:

Textbooks are a peculiar case in Philippine public schools, since [they are] the setter of both the basic agenda for classroom activity, and principal sourcebook (sometimes the only one ...) for both teachers and students.

(Hornedo *et al.* 2000:vi)

The business of textbook production and distribution under the auspices of the DepED has also been overshadowed by massive corruption scandals (Chua 1999), resulting in the proliferation of low-quality and multiple titles at the expense of a concerted focus on enhancing the quality of teaching and learning (Lontoc 2007;Diokno 2009). The decision in 1995 to end the government monopoly of textbook production failed to curb the corrupt practices, leading instead to what has been described as 'decentralized corruption', whereby government officials collude with textbook publishers to extract private gain (Reyes 2009). At the height of the corruption allegations, an investigative report (Chua 1999) revealed a sophisticated, mafia-like monopoly orchestrated by the then Department of Education, Culture and Sports (the Department of Education since 2001). Across the country's approximately 40,000 schools, Chua reported that the textbook-student ratio was typically grim. One textbook was shared by six pupils in elementary schools and by eight students in high school (Chua 1999:16). The following year, the UNESCO national commission on the Philippines reported even worse statistics: 10 pupils per textbook in the poorest districts, affecting approximately 12 million learners in the public schools (Hornedo et al. 2000).

Several initiatives were introduced to address this problem. One was the Third Elementary Education Project (TEEP), funded by the World Bank and the Japanese government. But TEEP covered only the 23 poorest provinces/divisions, covering 8,603 schools and about 1.74 million children (World Bank 2007). By the end of the project in 2006, it was reported that the ideal 1:1 ratio of textbook per pupil had been achieved, at least in the subjects of English, Mathematics, Science, and Filipino (World Bank 2007: 29). This was a national average and no data was provided relating to the production and distribution of Social Studies textbooks. In addition, the project completion report highlighted that the reported 1:1 ratio was not evenly distributed at the school level due to a lack of reliable pupil enrolment data. Recent assessment studies on the Philippines'

education system (USAID 2011;Ocampo and Maca 2012) did not cover textbook availability and the status of instructional materials development.

Public concern over corruption issues and the availability of textbooks has distracted attention away from the issues of their content and coverage, which is alarming given the extent to which both pupils and teachers rely on them. However, occasionally the quality of the textbooks has become a major public issue. For example, in 2007, the DepED had to issue a 21-page 'Errata Guide' designed to correct errors in 11 Social Studies textbooks and teachers' manuals issued earlier to 43,000 public elementary schools nationwide (Esplanada 2007). In addition, there is a lingering controversy relating to suspicion of the relationship between foreign aid for projects to expand textbook provision, and the benign treatment of former colonizers, especially the USA, within the covers of the resulting textbooks. In the 1980s, there were protests against a World Bank-funded textbook project that produced books portraying the Americans as 'accidental colonizers' (Constantino 1982).

The Japanese occupation is invariably presented as a separate learning unit in Philippine History and Social Studies subjects across different grade/year levels. At the elementary level, it is part of General History, as taught through the Social Studies subject in Grades 4–6 . In secondary schools, students encounter Japan in three discrete parts of the curriculum: the Japanese occupation of the Philippines as part of Philippines history in Grade 7 or First Year High School; Japanese History as part of Oriental History in Grade 8 or the Second Year; and finally Japan and WWII as part of World History (Grade 10 or Fourth Year). Third Year Social Studies is devoted solely to studying Economics. The portrayal of the Japanese occupation receives its most extensive coverage in Grades 4–7, and the textbook coverage beyond Grade 7 essentially repeats or elaborates the account introduced earlier. It is therefore the textbooks used in these grade levels (4–7) that are analysed in this chapter.

4.0 Nation building and education

Successive Philippine constitutions have mandated the purpose of education in the following terms:

1935 Philippine Constitution (Article XIV, Section 8):

All educational institutions shall aim to develop moral character, personal discipline, *civic conscience* and vocational efficiency, and teach the duties of citizenship.
(emphasis added)

1973 Constitution (Article XIV, Section 4):

All educational institutions shall aim to *inculcate love of country, teach the duties of citizenship* and develop moral character, personal discipline and scientific, technological and vocational efficiency.
(emphasis added)

1987 'Freedom' Constitution (Article II, Section 2):

All educational institutions shall inculcate patriotism and nationalism, foster love of humanity, respect of human rights, appreciation of the role of national heroes in the historical development of the country, teach the rights and duties of citizenship, strengthen ethical and spiritual values, develop moral character and personal discipline, encourage critical and creative thinking, broaden scientific and technological knowledge, and promote vocational efficiency.

(emphasis added)

The 1943 Constitution, enacted during the Japanese occupation, also mandated, in more explicit terms, the inculcation by educational institutions of loyalty to the state (Article IX Section 10):

All educational institutions shall be under the supervision of and subject to regulation by the State. The government shall establish and maintain a complete and adequate system of *national education*, and shall provide at least free public elementary instruction, and *citizenship training* to adult citizens. All schools, colleges, and universities shall aim to develop moral character, *personal and collective discipline, civic conscience*, and vocational skill, secure social efficiency, and *teach the duties of citizenship*.

(emphasis added)

The increasingly nationalistic emphasis of the 1935, 1973, and 1987 constitutions (the aberrant 1943 document reflects both the politics of occupation and the strong emphasis of Japan's own pre-1945 constitution on loyalty, discipline, and the duties of the citizen/subject to the state) has also been reflected in shifts in the aims identified in the official national curriculum. Currently, the competencies identified for the two school subjects of Philippine History and Social Studies include the fostering of 'a deeper sense and meaningful practice of patriotism, nationalism and citizenship among Filipino students' (DepED 2010). However, it is questionable whether these aspirations are pursued or implemented in any meaningful way. As with many aspects of public policy, the Filipino state has often failed to exert its authority and has ended up either captured by or compelled to negotiate (from a position of weakness) with sectoral interest groups such as the Catholic Church. Such lack of follow-through is reflected in the narrative of national history provided in school textbooks, which generally appear to give a low priority to fostering the strong sense of national identity for which the Constitution calls. The textbook narrative instead follows the 'prescribed' learning competencies stipulated in official curriculum guidelines, which seem weakly linked to the aspirations of the Constitution. In the 1992 curricular guidelines (still in force), these competencies to be fostered through study of the Japanese occupation (in the context of a discussion of the 'delay of independence') were defined as follows (DepED 1995):

- 1 discuss the events in the Philippines during the Second World War;
- 2 distinguish between the avowed and hidden aims of the Japanese in invading the Philippines;
- 3 analyze the structure of government established by the Japanese;
- 4 *feel proud about the courage displayed by the Filipinos in order to regain Philippine independence*;
- 5 discuss the return of the Philippine Commonwealth which went into exile during the war;

- 6 *and explain that war does not pay and does not contribute anything to the welfare of the country.*

(emphasis added)

There are a number of significant messages contained in these learning competencies. First, and most significantly, by locating the whole topic in the context of a discussion of the reasons for ‘the delay of independence’, they suggest that it was the Japanese who were primarily responsible for belated achievement of Filipino independence from America. In fact, the United States repeatedly promised Filipinos ‘self-rule’ after the installation of the first elected Philippine Congress in 1907 (Abinales and Amoroso 2005), and prior to that Filipinos had fought and died for independence in the war of 1899–1902. However, almost 40 years passed between the congressional elections of 1907 and the eventual granting of independence in 1946, with the Japanese occupation accounting for only three of these years.

While both ‘avowed and hidden aims’ are ascribed to the Japanese invasion—for example, the call for pan-Asian unity and anti-colonial liberation, on the one hand, cloaking the fundamental strategic goal of securing access to Indonesian oil for Japan’s war economy – the Americans are, by contrast, portrayed as ‘accidental colonizers’. Similarly, while pupils are encouraged to take pride in the courage of those who fought against the Japanese, specific examples of heroism in the cause of anti-Japanese resistance are notable for their absence, especially when compared with the stories told about anti-Spanish revolutionaries elevated to the pantheon of national heroes through the system of public schooling established under the Americans. According to Iletto (2005), the Philippines have had five great wars between the nineteenth and twentieth centuries (the three great Filipino wars of liberation from the Spanish, the Americans, and the Japanese; and the communist and Moro wars), but these are not discussed extensively in school textbooks. He refers to this selectivity as the ongoing ‘politics of remembering and forgetting’ (Iletto 2005:222). The final ‘anti-war’ clause of the curriculum guidelines seems designed to dilute any focus on the heroism and bravery of Filipinos who fought against invading forces – if all war is bad, so are wars of resistance.

Therefore, although national identity formation has been enshrined as a goal in successive Philippine constitutions and articulated in the overall learning outcomes of the national curriculum, it is not evident in the learning objectives specified for the study of the Japanese occupation. Early studies by Constantino (Constantino 1978; Constantino and Constantino 1978) faulted the education system’s failure to use schooling to inculcate a unified national identity, blaming this for contributing to the weak development of national consciousness among most Filipinos. This view was validated by Doronila’s (1989) study of a group of Filipino Year 5 students, of whom 95 percent expressed a desire to adopt a different nationality if given the chance. They also ranked the Philippines third (after the USA and Japan) among countries to be ‘admired, lived in and defended’.

The absence of a clear and effectively enforced policy on medium of instruction has also been viewed as contributing to the weak sense of national identity. This was evident in a 1998 nationwide language survey in which a majority of Filipinos stated they did not believe that a common language of instruction in schools should be used to

promote national identity (Gonzalez 1998). Only recently has the government decided that, from 2012, Mother Tongue-based Multilingual Education (MTB-MLE) is to be implemented at kindergarten level and in Grades 1–3, under the new ‘K to 12’ curriculum.

Within this broader curricular context, the country’s colonial history has been almost completely depoliticized, especially in textbooks for more junior levels. The filtering or sanitizing of the narratives of the US and Spanish colonial legacies has persisted, with the Americans receiving the most favourable treatment. One of the biggest factors hindering the education system from implementing its mandate of creating a Filipino national identity has been the Catholic Church (Constantino and Constantino 1978). In 1959, it succeeded in blocking government attempts to require the teaching in schools of the ‘anti-friar’ novels written by the national hero Dr. Jose Rizal. His novels portray the Church as the spiritual arm of Spanish conquest and colonization. Consequently, Filipinos are provided with a national hero who is honoured and celebrated for being a gradualist, a believer in education, and, like the *ilustrados*, a collaborator with America who was martyred by Spain (Ileto 1993:73). Constantino (1970) argues that it is for these reasons that Rizal was acknowledged as a Filipino national hero by the Americans as early as 1901. He explains:

In line with their avowed policy of preparing us for eventual self-government, the Americans projected Rizal as the model of an educated citizen. His name was invoked whenever the incapacity of the masses for self-government was pointed out as a justification for American tutelage. Rizal’s preoccupation with education served to further the impression that the majority of the Filipinos were unlettered and therefore needed tutelage before they could be ready for independence.

(Constantino 1970: 140)

5.0 Previous studies of textbooks

A small body of existing literature analyses the ideological content of Philippine curriculum, focusing especially on textbooks. However, previous examinations of Social Studies textbooks have tended to ignore coverage (or lack of it) accorded to the country’s war history. There has been little consideration of the reasons for or implications of the failure to capitalize on this painful collective experience to forge a strong attachment to a Filipino nation. Some studies instead highlight how Filipino textbooks emphasize the ‘gains’ Filipinos received from foreign colonizers, including the Japanese. Most avoid analysing the role of schooling or textbooks in national identity formation.

The classic study in this field was undertaken 30 years ago by Constantino (1982), who examined the contents of World Bank-funded Social Studies textbooks developed for the Marcos regime’s Ministry of Education and Culture (with 85 to 92 million copies estimated to have been in circulation by 1984). This study was a wide-ranging and outspoken critique, decrying, *inter alia*, the absence of an indictment of colonialism: ‘The arrival of each colonizer is celebrated with a long list of the good things we learned from him’ (Constantino 1982:28). Or, worse, colonialism was ‘justified’. She explains:

Instead of inculcating a strong anti-colonial sentiment, the presentation of our past subtly justifies colonization as a learning process for the colonized. The impression created is that we could have not have acquired the blessing of civilization had we not been fortunate enough to be colonized.

(Constantino 1982:29)

Consequently, she argues that political subservience and economic domination prevailed as the textbooks eschewed the promotion of a politicized sense of national identity. With the exception of the Japanese occupation, the incursions of other foreign aggressors were rationalized or justified. She elaborates:

Conquest is not presented as *ab initio* wrong and immoral, [as] the deprivation of a people's right to freedom through the use of treachery and superior force. [An exception is made in the case of the Japanese who had the temerity to take the Philippines away from the Americans. That conquest was wrong.] There is no explanation of colonization in terms of the economic self-interest of either the Spaniards or the Americans. Instead, both appear to have stumbled into colonization without meaning to.

(Constantino 1982:27)

Constantino's study also criticized the promotion of 'bland cultural nationalism' in the curriculum:

national identity is equated only with having, as other countries do, our own national flag, national flower, national tree, national costume and historical monuments. As for culture, students are urged to take pride in our rice terraces, dances, songs, literature, and in our national traits – Filipinos are hardworking, frugal, religious, and hospitable. But those aspects of our identity and our culture which are reactions to colonization or distortions caused by colonization are not mentioned.

(Constantino 1982:27)

In a later study of Philippine textbooks and national 'self-image' (Mulder 1990), the author similarly notes the portrayal of the 'good legacies' of the Japanese in some textbooks published in 1974 and 1982. Part of the study highlights how these Social Studies textbooks promote the view that the country's long contacts (including colonization) with foreigners have improved the cultural, and even to some extent genetic, stock of Filipinos. Regarding the Filipino 'gains' from Japanese contact, Mulder quotes the following extracts from two textbooks (Leogardo and Navarro 1974; Alcala, *et al.* 1986):

From the Japanese 'our ancestors also learned the important of industry of breeding ducks and fish for export'. Even during the Pacific War the Japanese were apt teachers for the 'Filipinos learned to cook Japanese foods such as sukiyaki, tempura, sashimi and many others. We learned to eat raw vegetables, meat and fish from the Japanese'.

Segovia's (1997) comparative study of pre- and post-martial law textbooks for elementary and high schools focuses on the different perspectives on democracy and citizenship promoted. She discusses how the concept of national identity is equated with 'national pride' and is inculcated in Grades 1–3 Social Studies through the discussion of: the Filipino family, Filipino physical appearance, the natural beauty and wealth of the country, the distinguishing character traits of Filipinos, and the highly

advantageous geography of the country (Segovia 1997:142). The textbooks for Grades 4–7, where the great Philippine wars are usually presented, do not tackle the concept of ‘national identity’ or even ‘national pride.’ She argues that national identity/pride is not promoted through the development of a historical narrative, which identifies national foes, heroes, victories, and periods of humiliation and suffering. A similar portrayal is provided by Cabiles (2012) who analyses changes to the national Social Studies curriculum over time and argues that, while the curriculum did not promote a politicized sense of national identity, it did promote a sense of identity that focused on the family, the church, and a form of global economic citizenship.

An evaluation of Social Studies textbooks conducted by the Philippine UNESCO National Commission (Hornedo et al. 2000) gives little attention to content analysis and focuses instead on technical aspects of textbook production (i.e. number of pages, style and language of writing, grammatical lapses, etc.). There is very little attempt to analyse the content related to the country’s war history, and no discussion at all of the treatment given to the Japanese occupation. Meanwhile, Diokno’s (2009) evaluation of the Social Studies curriculum and textbooks shows that there is an overwhelming emphasis on promoting a range of civic values deemed desirable by the government (including knowledge of elements of the state and various political concepts), as well as the rights and responsibilities of citizenship, but that the origins and importance of these values or rights and duties is not argued with reference to a narrative of Filipino history. She argues that the latter is approached from a limited, and at times biased, perspective that has the effect of sanitizing the past or presenting an incomplete picture of it.

It is a 2004 study by Yu-Jose that provides the most recent and substantive analysis of the portrayal of the Japanese in Social Studies textbooks published between the 1960s and 1990s. Yu-Jose analyses the implications of the ‘negative’ portrayals of the Japanese, relating these to the ‘nationalistic’ goals of the curriculum. This chapter builds upon the themes that emerged from that study, which are:

- 1 The texts highlight that many Filipinos gave their lives for the defence of the country or suffered at the hands of the Japanese. There was widespread economic devastation, which led to hunger and the breakdown of law and order.
- 2 The portrayal of social and economic disorder fed into a narrative concerning ‘local collaborators’ (*makapili*), but guerrilla fighters were generally relegated to the category of bandits.
- 3 The issue of Philippine independence from the US is highlighted in many of these books. The ‘independence’ given by the Japanese is described as fraudulent and the Filipino leaders who took office during the occupation are described as a ‘puppet government’. The portrayal of the Japanese occupation as ‘delaying’ the independence long promised by the USA is a recurring theme.
- 4 The Japanese are also accused of only promoting Tagalog (the basis of the Filipino national language) as the language of government, the education system, and the mass media for their own nefarious propagandist reasons.

- 5 The textbooks offer limited coverage of ‘prominent’ resistance leaders/fighters/heroes. Most are decidedly negative in their portrayal of local guerrillas, lumping the remnants of these wartime resistance bands with the ‘communist’ armed groups in accounts of the consequences of the onset of the Cold War in the 19 50s.

For this chapter, we have revisited Yu-Jose’s (2004) study of Social Studies and History textbooks published between the 19 6 0s and 19 9 0s and analysed an array of recent textbooks. Essentially, treatment of the key themes Yu-Jose identifies has changed, but in ways that further underline the issues she pinpointed. The textbooks analysed include a number used in both public and private schools for Grades 4–7 , ‘authored’ by the government but published both by the DepED and private publishing groups. The textbooks reviewed are:

- Three DepED ‘authored’ and published Grade 4 Social Studies textbooks (San Pedro-Guerra and Andal 1999; Agno 2000; Capina et al. 2000). These have practically the same content, with only slight variations in the number of pages and the chronological presentation of topics, and are recommended for use in public schools. Private schools are encouraged to use them, but often source out their textbooks from private publishers or produce them themselves. The texts were government-‘prescribed’, so that at one point all three books were used by almost all 4th graders in the 43,000 public schools.
- Two privately published History textbooks for Grades 5–7 (Zafra 1972; Zaide and Zaide 2010). Prominent historians, Galileo Zafra and Gregorio Zaide have been prolific history textbook authors. The textbook Zafra authored was widely used in both public and private schools during the Marcos administration, but is no longer in circulation. Zaide’s textbook is now in its 6th edition (now ‘updated’ periodically by his daughter Sonia Zaide), and is the most popular and widely used text in private schools.
- An alternative history ‘textbook’ (Diaz 2010). This book is ‘marketed’ as a textbook (with the author hoping it will reach that status and readership) but it is more of a compendium of historical commentaries on Philippine history presented chronologically, following the DepED curriculum. It is designed to be used as a supplementary text by teachers and pupils. The book has a strong pop culture flavour (e.g. the section on the colonial periods is entitled ‘Paella and Relleno versus Hamburgers and Sushi’), with caricatures and cartoons sprinkled throughout. Interestingly, a generous amount of the detail on the Japanese occupation has been culled from primary sources. Overall, this book is perhaps particularly likely to appeal to teachers and students in private schools, especially in the more affluent urban centres. However, it is difficult to ascertain its readership.

The main findings that emerge from our analysis of how textbook coverage of the Japanese occupation has changed, with a particular focus on the period since 2000, are discussed below.

6. 0 A sanitized discussion on colonization and war history

There has been a continuing tendency towards de-emphasizing the significance of wars fought against the country's colonizers (including WWII). The narrative on the start of the Spanish colonization adopts a very neutral tone and avoids using the term 'colonization'. For example, the DepED textbook prepared by Agno (2000) labels each unit on colonization by saying: *Dumating ang mga Kastila sa Pilipinas* (The arrival of the Spaniards in the Philippines), instead of *Ang Pananakop ng mga Kastila sa Pilipinas* (The colonization of the Philippines by Spain). Similar terminology is repeated in the discussion of American and Japanese colonization. This muted treatment of the colonization of the country is not new; even Zafra's (1972) Marcos-era textbook only focused on the Filipino revolt against Spain: *Himagsikan Laban sa Espanya* (Revolt against Spain), with coverage of the American and Japanese colonization appearing in the context of a generic discussion of foreign 'occupation'. The early part of the period of American colonization (1809 –1907) is also introduced in the Zafra textbook as *Ang Pilipinas sa Ilalim ng Isang Bagong Kapayarihan* (The Philippines under a new ruler).

Declining coverage of the Japanese occupation

The coverage of the Japanese occupation in the textbooks has significantly declined over the years. For example, it is not even accorded chapter-length coverage in Zaide and Zaide's (2010) textbook. It is subsumed a discussion of the course of WWII worldwide, and the author devotes only seven pages to the Japanese occupation out of the 152 pages devoted to the various colonial periods in the country's history. The short-lived British invasion of Manila and its occupation of a few provinces in Luzon (i.e. Cavite) and the Visayas, which took place from 1762 to 1764, are allocated a complete chapter (of six pages), while seven pages are devoted to the far more recent and arguably more significant Japanese occupation. Nor is this something peculiar to this text or to more recent editions, as the British excursion has long received extensive coverage in many History and Social Studies textbooks. Yu-Jose (2004) argues that the strong degree of variation in the portrayal of the country's various occupying forces by textbook writers has been influenced by their 'personal' experience and degree of affinity with a former colonial master – implying that many authors may attach some sort of kudos to this brief encounter with the British Empire.

Declining 'shock value' in presentation of themes of destruction and suffering

With significantly fewer pictures in recent textbooks, due to cost-cutting measures aimed at making learning materials more affordable, low-quality caricatures or line drawings have replaced photographs or original images, diminishing the 'shock' value of accounts of the destruction and suffering caused by WWII. A formerly ubiquitous grainy black and white image of 'Manila as an open city' has been replaced by a drawing in all the DepED authored textbooks. In contrast to earlier texts, the destruction of Manila (and even Baguio City) in 1945 is not portrayed as resulting from an 'American decision' (as part of their tactical retreat). Although Manila has been described as the 'second most destroyed Allied capital after Warsaw' (Abinales and Amoroso 2005), the extent of the destruction is not highlighted.

While harrowing pictures accompanying the story of the Bataan Death March can still be found in privately produced textbooks (e.g. Zaide 2010), these pictures are now absent from government textbooks, with only a map illustrating the route of the march. The Death March was the forcible transfer by the Japanese Army of almost 80,000 Filipino and American prisoners of war. It was characterized by wide-ranging abuse and murder, which resulted in the deaths of thousands of captives. This was later declared a Japanese war crime by the Allied Military Commission, but the episode is seldom discussed extensively in textbooks. The image below of the Death March was a staple in government Social Studies and History textbooks until the early 1990s, but no longer features in the latest editions. Historical research has recently revealed that this picture depicts not sick and weak prisoners being carried in hammocks, as was previously thought, but shows the daily morning routine whereby dead Filipino and American soldiers and civilians were taken for burial. Almost 10,000 Filipinos had died by the end of the march (Jose 2012).



Figure 9. The Bataan Death March

Americans as 'liberators' and the vilification of 'collaborators'

The portrayal of the Americans as liberators of Filipinos from the Japanese has been maintained in the most recent text. There is notably less 'hero worship'¹⁰⁹ of Filipino anti-Japanese resisters than of anti-Spanish freedom fighters. Aside from Jose Rizal, the most celebrated textbook heroes are the anti-Spanish revolutionary leaders such as Andres Bonifacio, Emilio Aguinaldo, and Apolinario Mabini, among others. By contrast, the leaders of the Filipino war against the US are mostly unnamed and described as 'guerrilla leaders'. No identified national hero emerges from the narrative of the resistance against the Japanese. Yu-Jose (2004) notes that significantly more coverage was given in 1980s textbooks to figures such as Supreme Court Chief Justice Jose Abad Santos and civic leader Josefa Llanes Escoda, who resisted the Japanese. However these individuals were not involved in active resistance, but were members of the country's elite whose lack of cooperation with the occupation authorities led to their deaths.

There has also been a marked decrease of the coverage of 'collaborators' from the elite class, some of whom went on to become leaders of post-war Philippines. Thus, for example, earlier texts elaborated on the roles played by wartime leaders such as Presidents Jose Laurel and Manuel Roxas, the nationalist Senator Claro M. Recto, Benigno Aquino Sr., and even Emilio Aguinaldo, the president of the First Republic inaugurated in 1898.¹¹⁰ In contrast, recent texts rarely mention that these 'wartime' leaders were accused of high treason (some were tried and later acquitted) after the Japanese were defeated. However, the vilification of 'ordinary' collaborators is maintained. They are usually depicted as faceless, hooded figures (as in the komiks discussed by Chua, 2013).

Growing emphasis on 'good' Filipino-Japanese post-war relations

Yu-Jose (2004) highlights in her study the trend in textbooks towards an emphasis on 'good' Filipino-Japanese post-war relations. This trend has continued and is best exemplified by Zaide's (2010) popular Grade 5–7 History textbook, where his discussion of the Japanese atrocities is followed by a summary of the 'historical values' to be derived from studying WWII:

5) Today, we have forgiven the Filipinos who collaborated and the Japanese who did atrocities to our people. We have good relations with the Japanese today.
(Zaide 2010:160)

Del Mundo (2007) argues that this emphasis on the 'good' post-war relations between the two countries is at least partly attributable to the influence of the DepED on some textbooks. He explains:

¹⁰⁹ The role of 'national heroes' in anti-colonial struggle dominates History education in the Philippines. It is referred to as 'hero worship' (especially for anti-Spanish revolutionaries), which started at the turn of the twentieth century when Jose Rizal, martyred by the Spanish in 1896, was officially endorsed by the American colonial government as a 'national hero'. But this 'official endorsement' would also lead to his portrayal as an 'American-sponsored' hero. However, hero worship is significantly downplayed for leaders of the wars against the American and Japanese occupations.

¹¹⁰ Aguinaldo attended the independence ceremony in 1943 under the Japanese sponsored government led by Laurel and 'hailed the republic as a fulfillment of the dreams of 1898' (Ileto 2005: 226).

The attempt to portray the courage of the so-called comfort women, sex slaves during the Japanese occupation, in coming out and recounting their ordeal also was rejected because it would strain diplomatic ties between Tokyo and Manila and debase Filipino women.

The Americans as war heroes

In all the textbooks reviewed, accounts of Japanese atrocities continue to be bracketed within a grand narrative portraying the Americans as ‘liberators’ of the Filipino people. Top billing is reserved for General Douglas MacArthur, America’s highest military leader in the Asia-Pacific theatre, as the ultimate ‘superhero.’ His *‘I Shall Return’* declaration when he escaped to Australia in 1942 was immortalized when he landed back in Leyte in 1944 in fulfillment of his promise. This portrayal of the invincibility and ‘heroism’ of the Americans is not new and has been sustained in part by the continuous suppression of war narratives relating to the Filipino war of liberation against the Americans. One vocal critic of the DepED’s Social Studies textbooks claims that ‘censorship’ was exercised by the department to ensure a more positive portrayal of the USA:

Evaluators rejected an account of the Balangiga massacre, where Filipino revolutionaries slaughtered American soldiers during the Philippine-American War, triggering a bloody reprisal from US forces. They said it was too violent . . . An illustration of the use of water torture employed by US forces against the Filipino revolutionaries also was rejected by the screeners, saying what was needed was a photograph.

(del Mundo 2007)

7.0 Summary and conclusion

Textbook accounts of the colonial period of the country’s history present Filipino children with an image of the Japanese as the most brutal among the three main foreign colonisers of the Philippines. However, the ‘shock value’ of the portrayal of Japanese brutality has been on the decline over recent years, with fewer pages devoted to the Japanese occupation in both government and privately published textbooks. The presentation, tone, and overall treatment of the occupation period has also become increasingly muted, with an increasing emphasis on promoting ‘good’ Philippine-Japan post-war relations. This is consistent with an overall narrative that, while describing facts and events, generally eschews any attempt to weave these into creating a ‘national’ story of anticolonial suffering, struggle and heroism. In stark contrast to Singapore, for example (see Chapter 11 of Morris et al. 2013), there is no official ‘Filipino Story’.

While other Asian countries have developed strongly anti-Japanese postcolonial narratives as part of a strategy aimed at building national consciousness and reinforcing sentiments of patriotic solidarity, official efforts in the Philippines to use images of the Japanese for a similar purpose have been sporadic and qualified. Since the 1980s, the slant has been rather towards emphasizing the bonds that unite Japanese and Filipinos, in mutual pursuit of reconciliation through cultural and educational cooperation, development aid, trade, and investment – as noted by Yu-Jose (2004). Similarly, in a recent study of the country’s post-war Social Studies curriculum, Cabiles (2012: 96) argues that the ‘external mobilization of (Filipino) national identity corresponds to the outward-looking portrayal of the nation, and global portrayal of the citizen’. To borrow

a saccharine slogan seen on posters around Beijing prior to the 2008 Olympics, Filipinos really are taught to see themselves as 'friends to all the world' (though, as many chapters in this volume suggests, that is not a prevalent goal of schooling in East Asia).

In sum, the portrayal of the Japanese occupation in Filipino textbooks corresponds to the prevailing approach to History/Social Studies education as a whole – history for history's sake. Implementation of the nationalist education goals stipulated in the country's constitution stops short at token 'nationalism', with only two heroic figures clearly emerging from the narrative: Rizal, stripped of his secularist views, and the USA as liberator of the country from the Spanish and Japanese. The dominance of moral (1990s) and peace (2000s) education in the Social Studies curriculum has also contributed to the depiction of the colonial period, with discussion of the Japanese occupation increasingly focusing on the record of post-war harmony and reconciliation. The overall curricular goals of 'Filipino internationalism and/or global citizenship' (Almonte 2003) seem to have had a greater impact on the nature of textbook coverage and eclipsed the goal of creating a strong sense of national identity. A number of analysts (Constantino 1982; Cabiles 2012) have linked the promotion of global citizenship in the school curriculum to official encouragement for Filipino labour migration, for which Japan and America are the prime destinations.

An additional explanation of the more abbreviated discussion of Philippine colonial history is the nation's limited resources, as reflected in the DepED stipulations prescribing the number of pages per textbook (Hornedo et al. 2000) due to budget constraints. Limited pages means limited coverage of certain topics and narratives of episodes such as the Japanese occupation are shortened or diluted. The fact that most senior officials in the DepED central office have been educated overseas may also have heightened their aversion to probing too deeply into past atrocities involving countries with which they may have developed an affective bond (del Mundo 2007; Diokno 2010).

More fundamentally, the attitude of political leaders towards Japan-Philippine economic relations has undoubtedly influenced official guidelines concerning textbook coverage of the past, especially as it relates to both the Japanese and the Americans. Since the 1980s, Japan has been one of the largest sources of overseas development assistance, especially for education programmes including textbooks. So, WWII-related issues that have erupted, such as those relating to 'comfort women' and the infamous 'Death March' have been downplayed in or simply omitted from textbooks. We have argued that the portrayal of the Japanese occupation has, in marked contrast to the other countries covered in this volume, not been used to construct a Filipino national story and develop a strong sense of national identity. The function it has served has been to portray the period of American colonization in a benign light. This treatment is not unique to coverage of Japan. It is the same with regard to the Spanish and American colonial narratives, which have similarly not been harnessed to creating a unifying historical narrative. Finally, what emerges from this analysis reflects a broader phenomenon, namely that the Philippines has not operated as a developmental state, in contrast to most other East Asian societies. The state in the Philippines has never exerted full control of the public domain, especially of its education system' (Maca and Morris 2012). Compelled constantly to negotiate with powerful non-state groups, such as the Catholic Church and foreign aid agencies, a weak state has proved unable to

harness the education system to either support the country's economic development or to construct a strong sense of national identity.

Chapter 7

Education governance reforms and skills certification of Filipino entertainment workers exported to Japan (1994-2004)

Abstract:

The previous chapter demonstrates the absence of any attempt to use narratives of the colonial past to forge a strong sense of national cohesion and solidarity. It shows how Philippine-Japan relations have been defined more by the 'politics of aid' and dominated by political discourses on forgiving and forgetting. This final chapter examines one aspect of the substance of this transnational relationship, casting a spotlight on Japan's unique role as a niche market for 'entertainment work' for Filipinos. It first sets the experience of expatriate Filipino musicians in Japan in historical perspective. The bulk of the chapter then investigates the status of migrant Filipino entertainers in the 1970s, when they became overwhelmingly female and part of the world of *mizu shobai* (literally 'water trade'), as the night-time urban bar scene was euphemistically known). It then analyzes the relationship between the new influx of female entertainers-cum-sex workers, referred to as *Japayuki*, and the twin development strategies initiated by the Marcos regime: i.e., the promotion of tourism (including 'sex tourism') and labor export. A principal focus is the link between the *Japayuki* phenomenon and the education reforms introduced during Marcos' 'New Society' experiment (1965-86) and further elaborated by succeeding governments – especially the mechanisms for certifying women as qualified entertainers. A major factor identified here is the decentralization (and segmentation) of the country's education system, completed in 1994, which made it vulnerable to patronage politics and corruption. This is illustrated by the 2004 *Japayuki* certification scandal, which shows how the technical-vocational education sector was rendered complicit in legitimizing the export of Filipino labour for semi-illicit employment in Japan.

1. 0 Introduction

Whilst the global diffusion of Filipinos as musicians and entertainers began as early as the 19th century, when their presence is documented as far afield as Bihar in India (cf. Atkins 2001; Quirino 2004), historical studies on the contemporary wave of migrant entertainment workers since the late 20th century are relatively few and far between. Ng (2006) has written on Filipino bands performing in key Asian cities, and De Dios (2015) analyzed the different categories of 'Overseas Filipino Musicians' catering to different niche markets. The Philippine government officially refers to migrant entertainers as Filipino "overseas performing artists" (OPAs), a category encompassing magicians and karaoke lounge hostesses as well as some of the best bands on the Asian hotel circuit. They perform in a wide range of venues from five-star hotels to cruise liners and international chain pubs. Beyond Asia too, OPAs work as far afield as The Netherlands, France, Italy, Portugal, Switzerland and Germany, the Pacific islands of Saipan and Palau, Djibouti in Africa, and on cruise ships plying North American and Caribbean

routes (Ng 2006). In Japan, many can be found working in tiny karaoke lounges where entertaining entails singing with guests, and sometimes servicing them sexually – a pattern of work associated with the migrant entertainers known as *Japayuki*¹¹¹. It is with this group that the present paper is principally concerned.

Most research on Filipino entertainment work has been conducted within the migration studies paradigm, with further contributions from fields including gender studies (cf. Tyner 1994, 1996a, 1996b, 2000), cultural anthropology (Suzuki 2008, 2011; Faier 2009), family studies¹¹² (cf. Fuwa 1999), and research on sex trafficking (Parrenas 2011), globalization and the gendering of migrant labor (Tyner 2004; Rodriguez 2010; Guevarra 2010). References to *Japayuki* frequently feature in historical studies of post-WWII Filipino migration to Japan or of Japan-Philippines relations more generally. Reports on the conditions of Filipino contract entertainers performing in Japan, often funded by non-governmental organizations, women's groups and human rights organizations, have highlighted issues such as the exploitative nature of their employment, and the impact of their work on their families (i.e. the prevalence of family break-up amongst this group) (c.f. Ballescas 1992; Medina et al. 1995; Osteria 1994, Palma-Beltran et al. 1992).¹¹³ Much research in this area has, understandably, been largely activist or polemical in intent, and less concerned with analysis and historical contextualisation.

One issue seldom discussed in existing work on the migration of Filipina entertainers to Japan is the role of education in this phenomenon. However, this dimension is critical to understanding the dynamics within the 'sending' state or society (the Philippines), especially as these relate to the management or facilitation of labor export in this sector. The relative neglect of this issue in the scholarly literature can be partly attributed to the fact that the relevant institutions – in the technical-vocational education sector – tend to be less studied than more formal, academic colleges and universities. In tackling this issue, the present paper builds on earlier studies¹¹⁴ of the role of education in the history of Filipino labor migration from the American colonial period (Maca 2017) to the era of the Marcos dictatorship (Maca 2018). This paper is narrowly focused on a specific period (1994-2004), where certain aspects of Filipina entertainers' deployment highlight the degree of complicity (unintended or otherwise) of education policies implemented towards the labor export program.

This chapter relates especially closely to Chapter 2 investigating the link between education reform and the use of labor export as part of a strategy for economic development under the Marcos regime (Maca 2018). Here I extend that previous work by focusing on the consequences of a combination of decentralized educational

¹¹¹ *Japayuki* is the collective term for migrant women workers trained to be **cultural entertainers** (emphasis added) but often forced into **prostitution** (original emphasis) in Japan (Kintanar 2009).

¹¹² On the narratives of other Filipinos working in Japan especially the manual laborer (counterparts of the majority deployed in the Middle East), the 3-part semi- autobiographical work of Rey Ventura (1992, 2007, 2014) of his life in Japan as a manual worker (*tachinbo*), a foreigner-husband and son in-law and the general travails of studying, working and living in Japan (illegally in earlier periods) is the most readily accessible. Japanese and Filipino scholars have also looked into the Filipino *nissei* children (first generation children with Japanese father and Filipina mother-mostly *Japayuki*).

¹¹³ They also exhibit a different dimension of the vulnerabilities of land-based overseas entertainment work, c.f. DAWN (2003), as compared to those working aboard cruise ships for example (see De Dios, 2015).

¹¹⁴ See historical analysis on the role of colonial education in early Filipino emigration to the US (authors) and labor export as a development strategy under Marcos (authors).

governance¹¹⁵ and the regime's drive, from the mid-1970s, to develop tourism to maximize foreign-currency earnings. While the latter was partly intended to burnish the country's international image (Tyner 1996,1997), the subsequent boom in visitor numbers was associated with a rapid rise in sex tourism. As we shall see, this phenomenon was in turn linked to the later export of Filipina 'entertainers' to Japan.

It was not until the early years of the new century that the role of educational institutions in this burgeoning industry attracted significant public notice, when the technical-vocational education sector was implicated in a 'certification-for-sale' scandal involving Japan-bound entertainment workers. Here I argue that this incident must be understood at least in part as an outcome of the fragmentation of administrative oversight of the education and certification systems initiated in the latter years of Marcos' rule. I suggest that one conclusion to be drawn is that the absence of strong or consistent state oversight will tend to encourage the corruption or distortion of certification arrangements in an education system geared primarily towards facilitating the overseas deployment of labor. But the fact that the system was allowed to develop in this way also indicates certain underlying truths about the political and social order in both the contemporary Philippines and in Japan – though the principle focus here is on the former.

The chapter is divided into four sections. The first traces the history of Filipino overseas entertainment work back to jazz musicians, who were pioneers in the migration of entertainers to Japan (and elsewhere) from the late 19th century to the early postwar years. I then show how Marcos' introduction of the labor export policy in 1973 triggered a reclassification of Filipino musicians and artists by the Japanese immigration authorities who lumped them under the generic category of 'entertainers.' The second section analyzes the links between the Marcos government's tourism campaign, the subsequent rise in sex tourism and the advent of the *Japayuki* era. The third analyzes education reforms initiated under the Marcos government (1965-1986), and maintained or further elaborated by his successors, which have had direct implications for the continuing export of labor in the 'entertainment' sector. Finally, the last part investigates how these reforms ultimately transformed related forms of technical-vocational education, and skills certification in particular, into means of legitimating what some have seen as state-sponsored trafficking of women for sex (c.f. De Dios 1992; Tyner 2004; Rodriguez 2010). As of 2018, this '*Japayuki*' phenomenon is still happening but on a significantly smaller scale than in the 1990s as extensively covered in current literature (cf. Parreñas 2011 for the latest and so far most comprehensive English-language study on Filipina *Japayukis*). One limitation of the paper involves the author's inability to read relevant literature in Japanese, but the primary focus here is on the Filipino side of this issue, and its relationship with domestic arrangements for training and certification. Meanwhile, a few attempts were made by the author to interview former and current TESDA officials to shed light on the ARB/*Japayuki* scandal (officially on record or otherwise) but they refused, with a very dismissive attitude of the issue as 'history.'

2. 0 Filipino jazz musicians as pioneer entertainment workers

¹¹⁵ The Marcos government adopted education decentralization prescribed in World Bank loan-funded projects implemented.

Filipinos entered the Japanese entertainment scene from an early date as musical and athletic performers (Suzuki 2008). In the 1880s, Filipinos were already widely admired as musicians (*kashu*), and a few gained celebrity status in the 1920s at the height of the fashion for American jazz music. Many of these mostly male performers were recruited by European orchestras and later by American jazz bands upon US annexation of the Philippines at the turn of the 20th century (Yu-Jose 2003). Boxers are another set of Filipino entertainers who enjoyed a high reputation in Japan from the mid-nineteenth to the mid-twentieth century. Until the 1970s, Japanese fighters vainly aspired to world titles, and were left admiring the fighting skills of boxers from the Philippines, a country in which the sport was more highly developed (Suzuki 2006).

Filipino jazz musicians can be considered as pioneer migrants in the Japanese entertainment sector. As US colonials, they were acculturated to American popular and dance music in the early twentieth century and many could sing in fluent English, having attended the colonial school system. American entrepreneurs also played a crucial role in recruiting many such musicians for work overseas on cruise ships¹¹⁶, in hotels and dance halls. They toured in major Japanese cities and other parts of Asia from Hong Kong and Shanghai to Bombay (Evangelista 2015). In his history of jazz in Japan, Atkins notes how prominent Japanese musicians and singers recognized Filipinos' musicality and their versatility in interpreting and channeling 'authentic' American jazz (Atkins 2001). Japan's earliest jazzmen 'certainly regarded musicians from the Philippines as the closest link to America that they could hope to have in the 1920s.' (Atkins 2001:60) These early migrant Filipinos in Japan had a relatively prestigious status:

It is not common knowledge that since the nineteenth century up to the 1960s, almost all Filipino workers in Japan were musicians. Indeed, they were called musicians, not entertainers. Their situation was both similar to and different from the situation of the present Filipino entertainers in Japan. They were popular among the Westernized Japanese of the 1920s and the Japanese middle class of the 1960s
(Uchino 1997 in Yu-Jose 2007:61).

Closely related to perceptions of the superior musicality of Filipinos in the jazz genre was their excellent command of the English language. This enabled Filipino groups to market themselves as 'American jazz bands.' And after the Asia-Pacific War, Filipinos' fluency in English and their ability to sing both Spanish and English songs made them the only significant cohort of Asians in the postwar entertainment scene in Japan.¹¹⁷ 'They were the best musicians. Japanese singers tried to learn from them.' (Alexander 2002 in Yu-Jose 2007:77).

By the 1970s, numerous Filipino bands were playing not only jazz but also rock and roll. There were several thousand Filipino entertainers active in Japan, and numbers had been steadily increasing. Early Filipino bands dominated the clubs on and

¹¹⁶ In 1922, a report in *The New York Times* noted that Filipino orchestras "are the interpreters of jazz on the Pacific Ocean liners"... the *Times* writer further declared that, "Where music is concerned, the Filipinos are known as the Italians of the East. Add their own barbaric musical strain—a blend of Oriental and Spanish 'ear culture'—and you get an idea of their adeptness with the torturous instruments of jazz." (Atkins 2001:59).

¹¹⁷ The American military brought in Filipino entertainers for the 'rest and recreation' of their own troops when they occupied Japan.

around the US bases, and especially those in Okinawa, until Japanese musicians began to take up jazz and rock music in larger numbers (Atkins 2001). Filipino performers were soon found at nightclubs and discos in urban centers across Japan. However, from the 1970s, two factors impacted negatively on the status of these musicians. Firstly, the spread of cheaper (and better quality) recorded music to some extent dented the market for their services. Secondly, especially during the 1980s, male performers rapidly began to be outnumbered by female entertainers brought in to work in Japanese hotels, clubs and bars (Parrenas 2011; Suzuki 2008, 2011).

The latter development was related to a classification ‘downgrade’ for Filipino musical performers, manifested in Japanese immigration regulations. Having previously been categorized as artists and musicians (*kashu*), in the 1981 immigration registry Filipinos suddenly found themselves lumped in the general category of entertainers (Yu-Jose 2007). Previous historical analyses of Filipino ‘entertainment’ work in Japan, both by Japanese and Filipino scholars, identifies this shift in Japan’s immigration and migrant labor regulations as the main factor determining the status of migrant entertainers (cf. Suzuki 2011; Morooka 2007; Yu-Jose 2007). However, this change in immigration category can also be interpreted as a Japanese response to labor export’s transformation into a Philippine state enterprise – a shift whose implications for the entertainment sector I explore in the next section.

The arrival of this new wave of Filipina “entertainers” in Japan was driven by the political and socioeconomic dynamics in both countries between the 1970s and mid-1990s. Officials desperate to find sources of foreign currency to boost the ailing Philippines economy launched an aggressive Philippine tourism campaign that resulted in an influx of male ‘sex tourists’ from an increasingly prosperous Japan.¹¹⁸ But a public backlash and official concerns in Japan over the country’s international image prompted a clampdown on ‘sex tours’ to the Philippines. It was in response to that clampdown that the import into Japan of *Japayuki* entertainers took off, as is detailed in the following section.

3.0 Rise of the Philippines as a destination for sex tourism

The emergence of the Philippines as a major destination for sex tourism began during the Vietnam War, when demand from American soldiers stationed in military bases fueled the rapid growth of entertainment establishments supplying sex alongside other services. As the Vietnam conflict wound down in the mid-1970s, red light districts increasingly sought to develop a new market among foreign tourists. As the Marcos regime’s heavy spending on infrastructure development (sourced from foreign loans) witnessed the construction of new hotels and an international airport, Metro Manila became a vital location of the sex industry.¹¹⁹ The expansion of the red light district in the nation’s capital coincided with the official drive to promote foreign tourism. Sexual entertainment was overtly promoted in tourism materials, as Tyner (1996) notes: ‘travel brochures, guidebooks, and tourist magazines regularly portrayed the Philippines as a mixture of sexuality and the primitive Other’ (Tyner 1996:82).

¹¹⁸ This phenomenon was not unique to the Philippines. In 1982 an estimated one million Japanese tourists visited other Asian countries like Thailand, South Korea, Taiwan, and Hong Kong on tours called ‘trips for men only’ which explicitly included visits to brothels (Thanh-Dam 1983 in Morooka 2006:66).

¹¹⁹ The country’s sex industry was initially largely confined to Angeles City, Pampanga (Clark Airbase) and Subic, Zambales, where the US naval facilities were located.

The tourism sector brought in much needed dollar income for the Marcos government at the height of an unemployment crisis and mounting trade deficits in the 1970s. At the same time as it was adopting labor export as a major plank of its economic strategy, the government created a Ministry of Tourism in 1973, and ratified a Friendship, Commerce, and Navigation Treaty between the Philippines and Japan (Rodriguez 2010).¹²⁰ This tourism promotion policy appears to have met with considerable success. The number of foreign visitors, which stood at 144,000 in 1970, jumped to 1 million by 1980. Japanese visitors comprised the largest cohort. They grew from 16,000 in 1970 to 24,000 in 1973 and to 265,000 by 1980. Having accounted for just 11 percent of total visitors in 1970, by 1980 Japanese comprised over one quarter (Tyner, 1997).

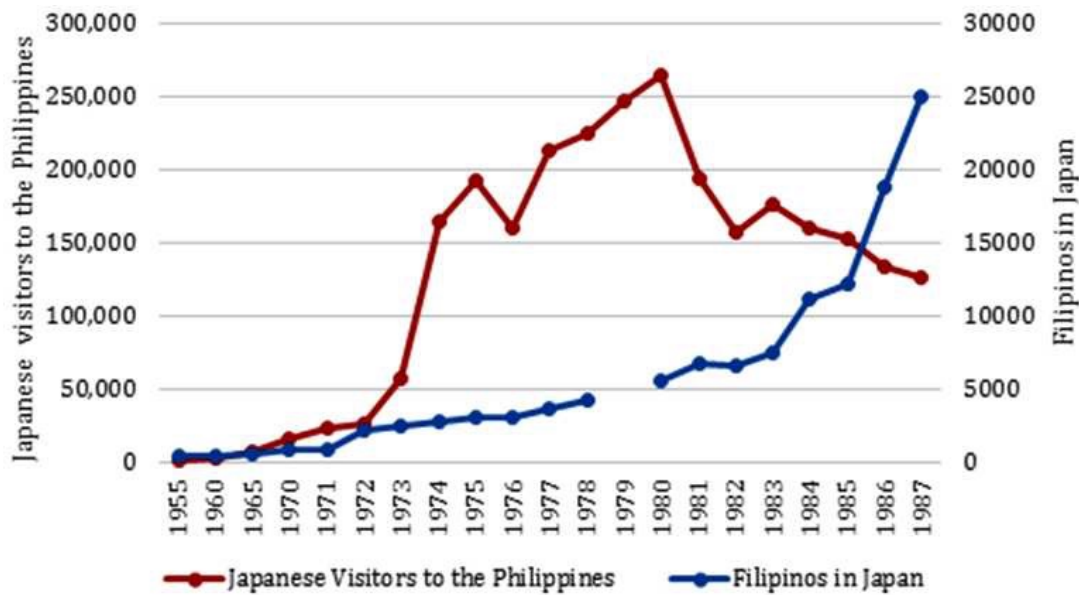
Most of the Japanese tourists were male (the male-female ratio was 5:1), and many purchased “entertainment services” from Filipino women. But this phenomenon prompted unease back in Japan regarding the resulting image of Japanese men as roving sexual predators. The Japanese authorities were keen to rein in this practice, and blatant ‘sex tours’ were eventually banned (Suzuki, 2000). However, as Tyner notes, what ensued was merely a ‘shift in venue’ (1997:24): rather than Japanese men travelling to the Philippines, Filipino women were ‘imported’ to satisfy demand in Japan’s growing domestic ‘sex industry.’

This occurred in the context of an expanding migration industry that emerged to facilitate the overseas deployment of Filipino labor from the mid-1970s. Involving various actors – from government institutions such as the Philippine Overseas Employment Administration, to private recruitment agencies, to individual talent managers and promoters – processes for promoting ‘entertainment migration’ steadily became institutionalized (Rodriguez 2010; Parrenas 2011). This is reflected in Figure 1, which shows a sharp decrease of Japanese visitors to the Philippines starting in 1980, and the number of Filipinos arriving in Japan increasing sharply shortly thereafter. The disaggregation of Japanese immigration data meanwhile reveals a steady increase in the number of Filipino women admitted into Japan holding ‘entertainer’ visas (Ballescas 1992).¹²¹

¹²⁰ The turning point in postwar Philippine-Japanese relations, this treaty opened Philippine doors to massive Japanese trade and investment, making Japan a top-trading partner, foreign investor, and most generous donor of official development assistance to the Philippines. (Ballescas 2003:564)

¹²¹ During the period 1981- 87, Japanese visitors declined from 193,146 to only 126,825 while the number Filipino workers deployed to Japan increased from 11,656 to 33,791, 93% or 31,292 of which were female entertainers (Tyner 1996).

Figure 1.0



Sources: Statistics Bureau of Japan (various editions) and National Statistical Coordination Board (Philippines, various editions) in Lambino (2015:12)

4.0 The *Japayuki* phenomenon

This systematic importation of Filipino women for the Japanese sex industry ushered in the so-called '*Japayuki*' era. Various services catering to this unique segment of the labor export program started to emerge – ranging from the proliferation of dance and music studios for training of prospective migrants, to the deployment of 'talent scouts' to the provinces to identify suitable recruits. Tyner (1996:412-13) observed that the entertainment sector of the labor export business was the most heavily 'regulated,' with layer upon layer of regulations relating to procedures for recruitment and deployment. For example, special licenses were required to engage in recruitment of migrant entertainers, with recruits then required to undergo extensive training and testing. However, this elaborate and ostensibly strict regulation of the preparation of migrant entertainers (recruitment, training and assessment of skills lasting 6-12 months) may have served to mask anomalies in their certification and eventual deployment – as I argue further below.

One aspect of the system for recruiting *Japayuki* that remains relatively opaque is the largely 'industry-managed' scheme of setting up dance and music studios as training centers, regulated in a manner similar to artists' guilds. This is in part a reflection of longstanding links between professional and college-based cultural dance troupes and the overseas entertainment industry. *Japayuki* entertainers formed part of this wider constellation that encompasses conventional performers whose work involves no sexual dimension, making it hard to determine where certification for *bona fide* musical performers shaded into cover for migrants destined to perform other services. As Faier (2007) notes, 'professional Filipino folk dancers worked as trainers, promoters, and examiners for Filipina women going to Japan, and some former cultural dancers used capital acquired through this work to start businesses recruiting Filipina women to work in Japanese bars' (151). Further, many of these select groups of 'cultural workers' turned 'labor exporters' had strong ties with the Marcoses, having participated in

international tours and performances as part of the propaganda machine of the 'conjugal dictatorship'.¹²² These prestigious socio-political connections helped lend a cloak of legitimacy to the business of exporting Filipino women for what often amounted to sex work.

The conditions of employment awaiting these women in Japan were precarious. The *Japayuki* influx during the 1980s coincided with an intensifying *kaikoku* - *sakoku* ('open country – closed country') debate, over whether or not Japan should become a 'country of immigration' (Brody 2002). Despite acute demand for cheap foreign labor, especially in the manufacturing and construction industry, the government resisted opening formal routes for migrant labor, instead tacitly sanctioning the use of informal mechanisms (i.e. traineeships) to bring in foreign workers, making foreign recruits highly vulnerable to exploitation. In the entertainment industry, Rijn (2016) argues that there was deliberate failure to enforce penalties against those (often organized criminal gangs) facilitating the entry and (illegal) stay of foreigners for illicit sex work. But from its very inception, the 'entertainer visa' scheme appears to have been designed to camouflage the illicit nature of the services these migrants would perform. Ostensibly admitted for theatrical, musical, and other cultural performances, in reality the majority of the holders of such visas were from the outset engaged in 'unauthorized work' as bar hostesses, nightclub dancers, strippers, and prostitutes (Piper 2003:738).¹²³

The insecurity this entailed was exacerbated by the fact that foreigners entering Japan on entertainer visas were (and still are) legally classified not as laborers but as "sojourners," to whom the domestic labor laws do not apply (Ballescás 1996:100 in Morooka 2006:97; Parrenas, 2011). As a ranking labor ministry official once testified in a Diet session, entertainers were distinguished from "regular workers" because their work, unlike normal labor, owed a great deal to the display of their artistic talent (Koyama 1992:332 in Morooka 2006:97). This further reduced the status of Filipina entertainers in the country, making them doubly 'illegitimate' - in the sense that they were workers outside the bounds of the Japanese labor laws, and engaged in work that was in any case technically prohibited under their visa category.

So how did these Filipina entertainers find themselves in this illicit and precarious position in Japan's labor market? What was the role of the Philippine government in facilitating their migration (or trafficking) to Japan? And how were their 'entertainment' abilities developed and certified as 'exportable skills'? The following sections attempt to answer these questions through a closer investigation of the development of systems for procuring, training and certifying these women before their departure from the Philippines.

5.0 Deployment of Filipino migrant entertainment workers

Japan-bound entertainment workers do not feature as a specific category in Philippine

¹²² Although this topic warrants a separate investigation altogether, check the works of Lico (2003), Baluyut (2012) and Espiritu (2017) on how the Marcoses capitalized on culture and the arts to glamourize their dictatorial regime.

¹²³ Ironically, Japan has been culturally and historically tolerant of the sex industry) and licensed prostitution had been practiced until 1946 when the Occupation Forces ordered to abolish the system (Yoneda 1998 in Morooka 2006:66). Japan's sex industry is also highly lucrative which Ballescás (2003) estimated an annual profit of \$5-billion, "an amount equal to the entire defense budget of the nation." (569)

registries of overseas workers (POEA, PSA, etc.). Even in the latest (2015) survey by the Philippine Statistics Authority (PSA), this group appears to be covered by category 3 (out of 9), which encompasses: service workers and shop and market sales workers; traders and related workers; laborers and unskilled workers. The latter subcategory comprises more than one third of the total annual deployment of migrant workers, and almost 55% of those who fall within this classification are women (the majority of them domestic helpers). Thus the studies reviewed in this essay typically rely on Japanese immigration statistics, using the number of ‘entertainment visas’ issued to Filipino migrant workers as a proxy estimate. The POEA does maintain a separate category for Overseas Performing Artists (“singers, composers, musicians”), but this mysteriously excludes entertainment workers bound for Japan. According to De Dios (2016), the peripheralization of this migrant workers group is a result of the ‘categorical conflation of entertainment work with nightclub hostessing and prostitution’ (186). Meanwhile, of the roughly 2,000 OPAs deployed annually between 2011 and 2014, some ended up registered as ‘able seaman’ if they perform in cruise ships according to De Dios’ seminal work on Filipino musical performers in cruise ships, theme parks and hotel lounges around Southeast Asia (2015). De Dios further notes that, since entertainers were included in the labor export program in late 1970s, the POEA has issued official statistics on the distribution and destination of OPAs only once (in 2014). These exercises in statistical obfuscation reflect the ambivalence of successive governments towards this sector. This ambivalence also relates to the skills certification mechanism for Japan-bound entertainment workers, discussed further below.

Table 10 Skills certification mechanism for Filipino migrant entertainers

Inclusive years	Official title of certificate	Policy cover	Oversight agency
1981-1985	Philippine Entertainment Certification Center Card (or the ‘Blue Card’)	Ministry Order 6, series 1981	Labor and Employment
1985-1994	Artist Accreditation Certificate (AAC or the ‘White’ or ‘Yellow’ Card)	Rules and Regulations Governing Overseas Employment- Book VII Rule VIII-Certification of Entertainers (issued 21 May 1985)	Labor and Employment (and Foreign Affairs)
1994-2004	Artist Record Book	Department Order 3, series of 1994	Technical Education Skills Development Authority
2005-	Artist Record Book (later revised to Artist Accreditation Certificate)	Department Order 67, series of 2004	Labor and Employment

Like its Japanese counterpart, the Philippine government has persistently adhered to the line that entertainers are 'artists' who thereby warrant distinct treatment from other categories of worker. It has therefore facilitated the large-scale migration of Filipino entertainers, not through bilateral agreements with receiving states (dubbed 'job orders' in the case of other categories of migrant worker), but by officially certifying entertainers as legitimate performers. Official monitoring of the flow of Filipino entertainers started in the early 1980s with the issuance of the Philippine Entertainment Certification Center Card, otherwise known as the "blue card" (MO 6, s. 1981). Entertainers had to undergo a performance arts skills assessment (singing or dancing), overseen by a panel of judges drawn from the local entertainment industry. In 1989, this was replaced with the yellow or white card, granting prospective migrant entertainment workers an Artist Accreditation Certificate (AAC). In 1994, a major overhaul of the certification program for entertainers was introduced, bringing them under the category of "professional, technical, and related workers". At the same time, responsibility for assessing entertainers was transferred from the Ministry of Foreign Affairs to the Ministry of Education, under the new 'Artist Record Book' (ARB) scheme (Parrenas 2011:34). A newly created entity, the Technical Education Skills and Development Authority (TESDA), would eventually take over this role (see below).

Thus beginning 1994, under a new 'label' (as the ARB) and under the purview of a new agency, the same certification system for migrant entertainers bound for Japan, South Korea, and Singapore was retained as a mandatory requirement for the pre-departure processing: from the POEA certification of the employment contract to the issuance of an exit visa for legitimate outmigration from the Philippines (De Dios 2015). As a key component of the system for training, testing and certifying performers, the ARB document was purportedly "designed to upgrade and professionalize the overseas entertainment industry, through the development of skills and careful selection of workers" (TESDA 2004). This was done through a series of academic and performance skills tests administered by the Technical Education and Skills Development Authority (TESDA), the skills certification agency of the POEA. However, as De Dios (2015) notes, the only certification tests issued by TESDA were for Singers and Dancers, two of the most commonly feminized occupations in creative labor (99).

In reality, the tests often served as gateway into *Japayuki* employment for young, unemployed and out-of-school Filipino women – a major target group of the government's technical-vocational education and job placement programs. In early 2004, a scandal erupted over the sale of ARBs (for as much as P50,000, or 100,000 JPY each), mostly to unqualified and untalented applicants. Lacking genuine musical or other talent, most of these ended up as prostitutes in Japan's brothels and nightclubs, thereby further undermining the already disadvantaged status of women migrant workers holding 'legitimate' entertainer visas. The government responded by restoring responsibility for accreditation of Japan-bound entertainers to the POEA. The ARB was then re-packaged using the old Artist Certification Certificate (AAC) mechanism (implemented back in the early 1980s) but with more stringent requirements. However, after only a year, in 2005, the Japanese government stopped recognizing this accreditation program, on the grounds that the flawed system did not credit "real entertainers."

The Japanese response was conditioned by other factors besides the certification

scandal in the Philippines. The unraveling of this certification-for-sale racket coincided with the release of a 2004-05 *Trafficking in Persons Report* by the US government, in which Japan was identified as a major culprit due to the large number of foreign women entertainers employed there (US-DOS 2005:132). In a sweeping and highly problematic manner, the US report identified the entertainers as sex workers trafficked illegally. Accordingly, Filipina hostesses in Japan were portrayed in the report as the largest group of sex-trafficked persons in the world, making up more than 10% of the 800,000 estimated victims of human trafficking worldwide (Parrenas 2011:6). To save face and improve their country's image abroad, the Japanese authorities decided to crack down on illegal immigrants in the country. First, all Filipino "overstayers," or those who had entered Japan on a tourist visa and subsequently found employment, were deported. The Japanese government then declared that it would no longer honor the AAC, citing the recent certification scandal. Since the AAC is an official Philippine document, Foreign Affairs officials considered filing a diplomatic protest but decided not to pursue this once they were confronted by mounting evidence from the Japanese side (Parrenas 2011).

From the onset of state-sponsored labor export in 1974, migration bureaucrats in the Philippines had originally handled the certification of outward-bound entertainers. In 1994, this responsibility had been transferred to a newly created technical-vocational education agency – TESDA (see below). However, the ARB scandal was never investigated as an educational issue, but was reported in the media and debated in various congressional hearings purely in relation to labor export policy (cf. Philippine Senate 2005). This involved overlooking the significance of two interlocking factors. One is the pervasive view of technical-vocational education – encompassing training in 'entertainment'-related skills – as inferior to 'formal' academic degree programs; a view institutionalized in the categorization of programs overseen by TESDA. The second involves the unforeseen consequences of the 1994 move to establish various 'autonomous' education agencies without any national-level institutional mechanism for coordinating or auditing their performance. These factors are further analyzed in the following section where a historical timeline of relevant education reforms is analyzed, particularly in the area of education governance and its impact on the technical-vocational education system.

6. 0 Education reforms

This last section analyzes two educational reforms initiated during or just after the Marcos years (1987-1994) which have had a direct impact on the export of Filipino entertainment workers. The first part discusses how the expansion of the technical-vocational programs eventually targeted young, unemployed and out-of-school Filipino women – prime candidates for overseas entertainment work. The second analyzes the negative implications of a radical fragmentation of the 'national education system' to the integrity of certification systems for overseas entertainment-related qualifications. The drive to streamline and decentralize bureaucratic governance was partly a reaction to decades of centralized political control under Marcos (1965-86), which resulted in economic stagnation, authoritarianism, and corruption. Of the four models of governance decentralization (Rondinelli and Cheema, 1983) –deconcentration, delegation, devolution (and privatization) – the Philippines adopted mainly the

devolution and privatization models, particularly in the health and education sectors. In education, Hanson (2010) defines 3 forms of governance decentralization as follows: a) *deconcentration*, which involves the transfer of tasks and work, but not authority to other units of the organization; b) *delegation*, which involves the qualified transfer of decision-making authority from higher to lower hierarchical units (with the delegating unit reserving the right to withdraw that authority); and c) *devolution*, defined as the transfer of authority to autonomous units that can act independently, or units that can act without first asking permission. Hallmarks of all three forms of decentralization can be seen in the contemporary Philippines. But reforms to the administration of the technical-vocational education sector have been characterized above all by 'devolution'.

Expanding technical-vocational education

In an earlier study (Maca 2018), I analyzed the ambitious reforms of the Marcos-era New Society Program, which aimed to address what was widely seen as a worsening mismatch between the needs of the economy and manpower skills. But a more urgent concern for the Marcoses was the lingering unemployment crisis amongst young and educated Filipinos, which represented a potential threat to the political survival of their dictatorial regime. An expanded TVET program was engineered which aimed to quickly train and deploy Filipinos for local employment and, increasingly, for placement overseas. Originally tasked with training and certifying technicians, domestic workers and hotel staff, the TVET sector was by the 1970s also involved in preparing entertainment workers for overseas employment, particularly in Japan.

The institutional history of the training infrastructure for the entertainment sector can be traced to an extension of the non-formal (i.e. non-school-based) branch of the TVET system initiated in 1966, when the Manpower Development Council (MDC) was created to promote skills training for employment. In 1969, the MDC became the National Manpower and Youth Council (NMYC). This reflected a new emphasis on providing skills and training to youth, especially drop-outs from the 'formal' schooling system. The latter included young women who were increasingly seen as ideal candidates for entertainment work abroad. The NMYC later established regional and provincial training centers that were eventually absorbed into the Technical Skills Education and Development Authority (TESDA), created in 1994. TESDA's remit extended to all TVE programs (i.e. Bureau of Technical and Vocational Education of the Department of Education, NMYC and the apprenticeship programme of the Department of Labor and Employment), and included the management of the ARB scheme for migrant entertainers.

This expansion of TVE witnessed the proliferation of 'training centers' for Filipinos who wanted to do overseas entertainment work. These were classified as technical vocational education institutes for 'cultural performance', encompassing the skills notionally expected of Filipinas applying for work as entertainers in Japan: singing, dancing and playing musical instruments. Faier (2009) and Ballescas (2003) trace the historical antecedents of *Japayuki* work back to a more glamorous elite dance tradition in the Philippines that dates to the early 20th century; originally, therefore, such schools were seen as preparing young women for a respectable occupation. But during the 1970s, as the Philippines witnessed an influx of tourists seeking sexual

gratification alongside ‘cultural’ entertainment, the image of “performing in Japan” as a respectable occupation was undermined.

From the mid-1970s to 1994, the Ministry/Department of Labor and Employment’s Philippine Overseas Employment Agency performed the validation and certification of prospective migrants’ ‘entertainment skills’. External examiners composed of ‘industry veterans’ (established musicians and performers) assisted government regulators.¹²⁴ But in 1994, as part of the process of decentralization (or fragmentation) discussed further below, this function was transferred to TESDA under a new tripartite arrangement for managing the education sector. Thereafter, from 1994 to 2004, the business of regulating and accrediting training institutes, and assessing and certifying entertainment skills, was officially under the purview of the government’s technical-vocational education agency.

It was also during this period that various anomalies related to the regulation of training and certification of migrant entertainment workers, including the illegal bidding of the ARBs mentioned above, were uncovered. Evidence discussed further below suggests that this is partly the outcome of the lack of centralized oversight and state control over the different sub-sectors of the education system as a result of the ‘successful’ decentralization reforms initiated under the Marcos regime and expanded by his successors. But understanding the origins of these administrative changes, and their implications, requires critical appreciation of the historical and political context in which such decisions were made.

Decentralization of educational administration

When the education bureaucracy was transferred to Filipino control during the Commonwealth era starting in 1936, the highly-centralized system of policy-making and educational governance established by the Americans was maintained (Calingasan 2016). A national council or board of education (NBE) was vested with functions encompassing all facets of educational planning and administration nationwide. This was composed of representatives from different branches or agencies of the government, the education sector and other sectors, appointed by the President. When Marcos assumed the presidency in 1965 he retained the same structure but reduced the membership of the board. But in 1982, after martial law was lifted, a new Education Act abolished the NBE, signaling the commencement of educational decentralization. At the time, nationalist critics of the regime alleged that this law had been introduced at the behest of the World Bank (Nationalist Resource Center 1982), and the wider role of the country’s creditors in education reforms introduced during this period is attested in earlier studies (Maca and Morris 2012; Maca 2018). Bautista et al 2008 highlight how almost a century of ‘externally-induced’ reform programs failed to transform basic education in the country. Meanwhile, decentralization initiatives in Philippine higher education were continuously being ‘initiated by Congressional or Presidential commissions’ (e.g., EDCOM, PCER and PTFE) and usually with the collaboration/advice of multi- lateral development agencies, according to Chao (2011:37).

¹²⁴ The POEA website (www.poea.gov.ph) has a repository of memoranda from 1984 to 1994 with the list and composition of these assessment panels.

Initiatives to decentralize educational governance in the country started as ‘prerequisites’¹²⁵ for the implementation of loan-funded programs supported by external creditors, led by the World Bank. At the level of basic education, for example, the World Bank loan-funded Program for Decentralized Education Development (PRODED), from 1983 to 1989, prescribed more school autonomy and additional decision-making powers for school heads. Earlier loan packages targeting higher education (e.g. engineering and agriculture) and technical-vocational training programs also came with a ‘decentralized governance’ component (Alba 1979).

The process of breaking up what was by then condemned as an excessively monolithic and over-centralized education system was thus initiated during the waning years of the Marcos regime and continued by succeeding Aquino (1986-92) and Ramos (1992-1998) governments. The process was completed in 1994 when the Department of Education (DepEd), Commission on Higher Education (CHED) and Technical Education and Skills Development Authority (TESDA) were separately established, with the heads of each enjoying ministerial rank. This prompted the resignation of then Education Secretary Armand Fabella, who argued for “the need to oversee the various educational levels – elementary, high school and college – as parts of an integrated system,” emphasizing that “the regulation of basic education and tertiary education must be linked and coordinated, not delinked and separated from each other” (Landingin 2016:254). Almost two decades later, Chao (2011:37) would pointedly argue that ‘although the tri-focalization of education increased the focus on each sub-sector, little comprehensive effort on planning and developing the entire sector in national, regional, and global macroeconomic requirements has been initiated.’ This failure to advance in its developmental role as ‘sector,’ resulted in Japan-bound migrant entertainers getting deprived of their ‘skills accreditation’, in the light of global human trafficking policing for example, which the Philippine government in general failed to anticipate or adequately address.

The scope and boundaries of the mandate for each new agency were defined through legislative fiat with loosely-worded provisions on ‘coordinative’ functions, responsibility for which was left vague. Succeeding governments after Fidel Ramos (1992-1998), under whom the drive to deregulation and decentralization accelerated, made no moves to re-establish a national council or board (along the lines of the pre-1982 NBE) to exercise some sort of ‘policy oversight’ over the entire system. Although the short-lived Estrada administration (1998-2001) convened a National Coordinating Council for Education (NCCE) in 2000 (EO 273, s. 2000), this was conceived as ‘a regular forum for trans-subsectoral consultations on cross-cutting policies and programs’ for the three education bodies, and thus had a limited remit. Macapagal-Arroyo (2001-10) abolished this council in 2007 (EO 632, s. 2007), and appointed a Presidential Assistant on Education to perform its functions. She later installed a more loosely-organized Presidential Task Force on Education (EO 652, s. 2007). In justifying the abolition of the NCCE, the relevant order (EO 632, s. 2007) stated that ‘CHED and DepEd vehemently opposed the TESDA chairmanship’ of the council. This exposed the deep rifts amongst leading officials with responsibility for education in the aftermath of the TESDA certification scandal involving the *Japayukis*.

¹²⁵ As part of prescribed project ‘components,’ the decentralized approach to education delivery was tantamount to a ‘conditionality’ in loan negotiations and approval.

Looking back, the 1982 abolition of the NBE thus left a void in the management of the country's education system that subsequent governments neglected to fill. Two decades later, the 2004-5 TESDA scandal can be seen in part as a consequence of the weak oversight of the technical-vocational education sector that resulted from this fragmentation of educational administration. This fragmentation and lack of oversight contributed to mounting corruption in the technical-vocational education sector, with TESDA embroiled in numerous scandals (of which that relating to '*Japayuki*' certification was just one).¹²⁶ The division of educational administration amongst three separate bodies each headed by presidential appointees, with no coordinating authority, rendered these bodies effectively the personal fiefdoms of the incumbent minister. In an earlier study (authors), I demonstrated how ministers with responsibility for basic education have tended to perform their duties as an exercise in dispensing patronage. This study argues that similar patterns of behavior, i.e. seemingly arbitrary 'reclassification' (more of re-labeling) of migrant entertainers 'credentials,' were reinforced as a result of the administrative fragmentation that accompanied the creation of TESDA. The continuing politicization of the education sector warrants a separate study altogether but various sector-wide assessments since 1994 (c.f. PESS 1998; PCER 2000; PTFE 2008) have failed to analyze where the decentralized structure is failing or becoming vulnerable to abuse. The scant literature analyzing education decentralization delves more into individual 'sub-sector' analysis (cf. de Guzman 2007 for basic education; Chao 2011 for higher education), with only passing reference to its links to technical-vocational education. Meanwhile, research on systemic corruption in the basic education sector identifies a pattern of 'decentralized' corruption (Chua 1999; Reyes 2009) in different areas (i.e. textbook development and procurement) and levels of governance.

Evidently the Philippine education system underwent the 'devolution' variant of decentralization (Hanson 2006), defined earlier as the transfer of authority to autonomous units that can act independently. This perfectly describes the behavior of TESDA in relation to its decade-long (1994-2004) management of the certification system for Japan-bound Filipino entertainment workers. Such exercise of autonomy is within the bounds of its own charter (Republic Act 7796) but as has been argued earlier, a more robust accountability mechanism, such as a national council of education, might have provided more effective oversight.

7.0 Summary and conclusion

This chapter analyses the relationship between systems for training and certification in the Philippines, and the migration of '*Japayuki*' entertainers to Japan since the mid-1970s. It locates this phenomenon in the context of the longer history of migration by Filipino performers to Japan. The fact that many Filipino entertainment workers ended up in semi-prostitution can be seen as resulting from a failure of the Filipino qualifications and labor export systems, and a general weakness of the Philippine state's bargaining powers vis-à-vis Japanese interests when it comes to the design of immigration regulations. This latter claim is rather tentative requiring further investigation (but beyond the scope of this study), but to a certain degree is implied in

¹²⁶ Allegations of massive corruption in the agency were confirmed by a senior staff of a Congressman who was appointed TESDA Director General during the incumbency of Gloria Macapagal-Arroyo (personal interview, May 10, 2017).

existing literature (cf. Tyner 2003 and Parreñas 2011 research pertaining to Filipina *Japayukis* and Morooka 2006 study on Japan's 'foreign guest workers' which also tackles *Japayukis*).

I have argued elsewhere that the resort to labor export as a key plank in the government's developmental strategy is related to the continuing dominance of the Filipino state by a neo-feudal kleptocracy of landholding '*caciques*' and assorted tycoons which conducts governance as an exercise in patrimony. For this dominant class, labor export has been both a highly profitable enterprise, and a means of diverting or ameliorating social tensions that might otherwise have sparked significant political unrest (cf. authors). But while this political context may help explain in general why the ruling elite has effectively transformed the Philippines into a 'labor-brokerage state' (Guevarra 2010; Rodriguez 2010), how is it related to the peculiarly *laissez-faire* approach of the Filipino state with regard to the export of female entertainers? As we have seen in this sector, unlike others, the state has relied on the flimsy mechanism of the ARB (or similar certificates) to legitimate the status of 'entertainers', rather than engaging in the kinds of bilateral negotiations involved in exporting other categories of worker.

The hands-off approach of the state authorities towards regulation of the migrant worker trade – especially as it related to vulnerable female workers – was reflected in the terms of an ostensibly rigorous program of welfare protection for Filipino migrant workers introduced in the mid-1990s. This was introduced in the aftermath of high-profile cases of abuse, murder and execution of Filipino migrant workers in Japan, Singapore and the Arab Gulf states. Grandly called the Magna Carta of Overseas Filipino Workers (OFWs) (or Republic Act 8042: The Migrant Workers Act and Overseas Filipinos Act of 1995), it spells out various social and legal protections that the state will extend to its migrant workers. But still underpinning this legislation is 'the notion that the state does not promote overseas employment but simply facilitates the "choice" of Filipinos to work overseas' (Rodriguez 2010:37).

While further research is needed in this area (using Japanese as well as Filipino sources), it also seems likely that the Philippine government's pusillanimity on the *Japayuki* issue has reflected the balance of diplomatic and trade relations with Japan – the country's biggest trading partner and source of developmental aid. In another study (authors), I showed how accounts of wartime Japanese brutality in curricula and school textbooks have been diluted or sanitized over time, at the same time as the commercial and diplomatic interests of Filipino elites have become increasingly aligned with those of Japan. I have also argued that this transition to more favourable depictions of Japan was facilitated by the absence of a strong anti-colonial narrative – something which Filipino elites, with their collaborationist record, have been keen to avoid. Former colonizers – especially Spain and America, but also Japan – are portrayed in a strikingly favourable light. This can in turn be related to the relatively weakly-held sense of national identity that animates Filipino society. Partly as a result of this, the mass trafficking of women to Japan from the Philippines – a country that within living memory was part of the Japanese military's 'comfort women' system of sex slavery – has aroused little public resentment. To some extent, this applies also to the *Japayukis* themselves and those advocating on their behalf, whose failure to hold the Philippine

state accountable for their welfare and protection may be seen as symptomatic of the broader weakness of Filipino national consciousness (authors).

Finally, whilst the technical-vocational education system was instrumental in exposing a weak link (certification of exportable skill) in an otherwise 'global model' of labor-export state enterprise, evidence from basic and higher education sectors must be analyzed.¹²⁷ However, evidence analyzed in this paper confirms how the skills certification scheme (ARB program) was manipulated for the large-scale deployment of Filipina entertainers, and as a cover-up for corrupt practices of labor (POEA) and education (TESDA) officials. Whilst being under the purview of the technical-vocational education subsector not only legitimized this racket, it also exploited lingering weaknesses of educational institutions. Nevertheless, this warrants a more systemic investigation contiguous to the long overdue task of assessing the impact of the complete segmentation of the Philippine education system since 1994. Reform programs in the past two decades under this decentralized/segmented system have generated mixed results, with foreign aid donors mostly claiming success in certain areas (e.g. principal empowerment in school-based management). In the end, the many promises of educational change are manifested in a singular hallmark- the unabated expansion of a sophisticated system of training and certifying exportable skills for the global market. Meanwhile, the Filipino state stubbornly adheres to its fictional nationalist narrative: that the foundation of modern Philippines rests upon the shoulders of loyal and patriotic cadre of migrant citizens.

¹²⁷ In higher education, an interesting case would be the nursing licensure examination items 'leakage' scandal in early 2010s involving members of another 'independent' skills certification body- the Professional Regulatory Commission (PRC), and the more recent controversy on the recognition of Filipino seafarers training and 'credentials' by European Union authorities, involving another government agency- the Maritime Industry Authority or MARINA. As the largest global supplier of seafarers, EU officials wanted compliance of the Philippines with the STCW convention (International Convention on Standards of Training, Certification and Watchkeeping for Seafarers) but bureaucratic red tape and allegations of corrupt practices among MARINA officials delayed the audit and approval of Philippine maritime schools by EU maritime authorities.

Epilogue

In my introductory chapter, I noted that this study is not exhaustive and that alternative perspectives on its major themes may have been excluded. This section very briefly sketches an agenda for further research with the potential to elaborate or even refute the arguments presented here.

On labour export. Though this thesis frames the Philippine labour export program as state-orchestrated or top-down development strategy, such a strategy could not work without ‘demand from below’ – from a substantial population of educated unemployed who are victims of economic desperation at home. This is exemplified in the case of the Filipina entertainers discussed in Chapter 7, and arguably also by that of the migrant workers who applied (or were systematically recruited) for manual work in Hawaii plantations in the early decades of American rule (discussed in Chapter 3).

On privileging English. The phenomenon of Filipinos embracing English and adopting an ‘outward-looking’ perspective could be interpreted as a pragmatic strategy for leveraging skills and credentials earned from an American-modeled education system. I argue in this thesis that the importance attached to English and the influence of America as a model (in various ways) have contributed to undermining the effectiveness with which the school curriculum projects a coherent vision of ‘Filipino-ness’. But the extent to which this can or should be construed as a sign of weak Filipino national sentiment needs further research.

On Filipino national identity. In light of the above, one hypothesis worth further investigation is that even before the onset of the labour export program, official efforts to define or conceptualize Filipino citizenship were weak or incoherent. The identities of paramount importance for most citizens remained familial or, perhaps, regional, but identification with a collectivity at the level of the state was weak by comparison with what we find in the East Asian developmental states, even before the advent of ‘developmental statism’.¹²⁸ In other words, it is necessary to consider the extent to which the way in which schooling defines nationhood not only helps to shape predominant social or cultural attitudes, but is *shaped by them*.

On being ‘global citizens.’ Before the mass export of Filipino labour began in the 1970s, only the privileged could afford to travel and enjoy the perspective-broadening effects that the experience of other cultures confers. Labour migration brought the benefits of travel to a wider public. Like the 19th-century *ilustrados* (Rizal and his contemporaries) – who were the first people to call themselves “Filipinos” – modern-day Filipinos have been exposed to new ideas, attitudes, and technologies. They bring their recently acquired knowledge back home, where it challenges traditional ways of thinking, or at least opens up discussion. The average overseas Filipino worker is more aware of the world outside these islands. The result has

¹²⁸ The unique dynamics of a ‘strong’ Filipino family as an institution and compared to a ‘weak’ Philippine state is explored in Kaelin’s (2012) study.

been “The New Global Filipino” (Zafra 2008 p. 12), a sophisticated citizen whose interests go way beyond his or her *barangay*¹²⁹ of residence. Thus this ‘weak nationalism’ and a readiness to adapt and identify as ‘global citizens’ may also be construed positively. Comparatively speaking, Filipinos’ relatively weak sense of national loyalty may in some respects be preferable to the kind of overdeveloped and exclusive sense of national loyalty evinced by citizens of many other societies.

On the lingering political malaise, I would re-echo the hopeful lamentation back in 1990 (4 years after the EDSA ‘People Power’ revolution) of the late O.D Corpuz, eminent historian and former Minister of Education:

Inside of a generation, perhaps before the end of the century, Filipino politics will go through a civil war or revolution or *coup d’etat*. The primary reason will be the proven incapacity of the political system – its leadership and institutions – to serve the basic needs of the masses and to win over the politicized youth... These extra-constitutional processes will create either the new democratic leaders or new dictators. It is too early to tell, but perhaps even the new authoritarian leaders would not be viewed as worse than their predecessors, who ignore the nationalism of the Filipino’s first and one true Revolution.

(Doronila 1992:51)

He was of course invoking the spirit of the Philippine Revolution of 1896 led by the proletarian Andres Bonifacio (who was inspired by Jose Rizal’s writings) as a reminder of this ‘unfinished revolution.’ Almost three decades have passed since Corpuz was writing; I am personally not inclined to affirm his sentiments, but nor do I feel that they can be entirely dismissed. Various elements in society (particularly amongst the more educated) protest the current Duterte administration as worse than the Marcos dictatorship, but all indicators of political legitimacy indicate otherwise. Survey after survey reveals that Duterte enjoys unprecedented support across all socio-economic class. Overseas Filipino workers and diaspora populations across the globe are his most ardent supporters (and defenders), with most of them claiming that he is the only Philippine leader to truly care for them. They dominate that key arena of political battle, the Internet, through various social media platforms. Marcos claimed his New Society was a ‘revolution from the middle’ when he abandoned the old political order and conscripted new players, but Duterte’s ‘revolution’ is still unfolding and Filipino migrant workers and the diaspora are in the vanguard of his supporters. The reasons for this require serious investigation.

Finally, the role of education in nation-building is continuously being adjusted, re-oriented or reinvented. Nationalist narratives and counter-narratives are being churned out across social strata, amongst groups of indigenous and emigrant Filipinos. Whilst many still subscribe to lofty ideals of education as a harbinger of social change, economic prosperity and national solidarity, a great majority simply consider it as a means for personal advancement – to learn a trade in order to work or relocate abroad. ‘Education for migration’ is the orientation that shapes much of what schooling and tertiary instruction in the Philippines. But the country is also

¹²⁹ *Barangay* refers to a village in Tagalog/Filipino language.

undergoing a transition from a labour-brokering state to an emigration state – exporting not just skilled workers, but global citizens. Analyzing and assessing the ‘global’ and ‘national’ components of their identity, and what ‘global citizenship’ means for Filipino emigrants in the 21st century, would be a fascinating subject for future research.

Annex 1. Main findings and discussion points per chapter

	Headings	Main findings
<i>Chapter 2:</i>	The Philippines, the East Asian 'developmental states' and education: a comparative analysis of why the Philippines failed to develop (Journal article)	<ul style="list-style-type: none"> ● Highlight the nature of Philippine state as 'anti-developmental state' (in comparison with the East Asian developmental states- Taiwan, South Korea, Singapore, Hong Kong); maintenance of the <i>status quo</i>- dominance of the oligarchy (and <i>caciques</i>) dating back to colonial era. ● Identifies the pervading notion that the general purpose of education is for 'individual' social mobility and not for ensuring social cohesion and fostering national identity (in contrast with the East Asian developmental states) ● Weak 'control' of the education system by the Philippine state; constantly negotiated with powerful vested interests while maintaining its neo-colonial relationship with the United States ● Beginnings of the phenomenon of 'education for migration' with the institutionalization of labour export policy in 1973 (<i>elaborated further in chapter 3 below</i>)
<i>Chapter 3:</i>	Education in the 'New Society' and the Philippine labour export policy (Journal article)	<ul style="list-style-type: none"> ● Characterizes the two decades of Marcos rule as the epitome of 'cacique democracy'- a formal system of democratic politics but with a feudal pattern of land-ownership and social order, including a stratified schooling system ● From a temporary and seasonal employment strategy during the early American colonial period, labour export has become a cornerstone of the country's development policy; institutionalized under the Marcos regime (1965-1986), and especially in the early years of the martial law period (New Society experiment, 1972-81) ● Evidence suggests that sweeping reforms extending from curricular policies to education governance and funding did little to boost domestic economic development. Instead, they set the stage for the education system to continue training and certifying Filipino skilled labour for global export – a pattern that has continued to this day.
<i>Chapter 4:</i>	American colonial education policy and Filipino labour migration to the US (1900-1935) (Journal article)	<ul style="list-style-type: none"> ● Discusses the historical context of the first wave of Filipino migration to the US as manual labourers in Hawaii plantations and some professional nurses who stayed behind or were recruited after undergoing training in US university hospitals. ● Analyzes the colonial education programs and policies: on medium of instruction (English), civics and history education in basic education and scholarship programs for training and higher education in mainland US which has a lasting impact on Filipino socialization towards migration to the US. ● Identifies the explicit promotion of the US for Filipino labour migration in colonial-era textbooks and teachers manuals analyzed in this paper. Themes on the advantages of English proficiency for 'future' international engagements (business or diplomacy were highlighted as examples) are also found in these education materials. ● Beginnings of the lack or weak 'anti-colonial' narrative in the curriculum- a critical element in fostering a strong national identity (<i>elaborated further in chapters 5 and 6</i>)

Chapter 5:	Education, national identity and state formation in modern Philippines (Book chapter)	<ul style="list-style-type: none"> • Analyzes citizenship education programs (and curricula) across different eras: from the ‘revolutionary’ period in 1896-98 to the Aquino government (2010-2016). Program implementation is found to be fragmented and ineffective and compromised by patronage (‘personality-based’) politics pervasive in Filipino society. • Argues that the neo-colonial relationship with the United States has perpetuated political, economic and cultural dependency, further compromising the development of Filipino democracy. Highlights the prevalence of ‘elite democracy’ as a result of an American-style democratic political system transplanted into a semi-feudal society. • Argues that citizenship education programs in general, and history as a school subject in particular, have failed to develop a sense of shared national identity. • Highlights how the privileged status of English in Filipino society is retained, especially in the education system. English proficiency is touted as an advantage in the global labour market.
Chapter 6:	National identity formation and the portrayal of the Japanese Occupation in Philippine textbooks (Book chapter)	<ul style="list-style-type: none"> • Highlights the depoliticized approach to history education narrative of Spanish colonization filtered by Catholic scholars, whilst the Americans are still portrayed as a benign visiting power that liberated the country from the Spanish and the Japanese. • Whilst other Asian countries continue to portray the Japanese as the threatening ‘Other,’ Filipinos tend to highlight good post-war relations with Japan, highlighting economic cooperation, international aid, reconciliation and Filipino internationalism or ‘global citizenship.’ • No attempt to use the colonial narratives in: forging a strong sense of cohesion and solidarity, amplifying the sense of ‘national shame’ for the suffering endured by the Filipino people, and, ultimately in creating a Filipino national narrative and identity. • Post-war Philippine-Japan relations defined by the ‘politics of aid.’
Chapter 7:	Education governance reforms and skills certification of Filipino entertainment workers exported to Japan (Journal article)	<ul style="list-style-type: none"> • Investigates the relationship between the influx of female entertainers-cum-sex workers to Japan, referred to as <i>Japayukis</i>, and the twin development strategies initiated by the Marcos regime: promotion of tourism (including ‘sex tourism’) and related cultural activities; and labour export. • Analyzes the link between the <i>Japayuki</i> phenomenon and the education reforms introduced during Marcos’ ‘New Society’ experiment (1965-86) and further elaborated by succeeding governments – especially the mechanisms for certifying women as qualified entertainers. • Major factor identified here is the decentralization (and segmentation) of the country’s education system, completed in 1994, which rendered the technical-vocational education sector (somewhat) complicit in legitimizing the export of Filipino labour for semi-illicit employment in Japan. • Highlights the weakness of social institutions, including the education system, in the wake of the dominance of patronage politics in Filipino society. This is exposed in the corruption scandal involving TVE officials managing the skills certification

		of this vulnerable group of migrant women workers.
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