

# READINGS IN PHILIPPINE HISTORY

John Lee P. Candelaria  
Veronica C. Alporha

Handwritten text in Tagalog script, likely a historical document or manuscript, displayed on a textured background.



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# Contents

|                    |     |
|--------------------|-----|
| Introduction ..... | vii |
|--------------------|-----|

## Chapter

1

|  |          |
|--|----------|
| <b>Introduction to History: Definition, Issues, Sources, and Methodology .....</b> | <b>1</b> |
| Definition and Subject Matter .....  | 2        |
| Questions and Issues in History .....  | 3        |
| History and the Historian .....  | 5        |
| Historical Sources .....   | 6        |

## Chapter

2

|   |           |
|---|-----------|
| <b>Content and Contextual Analysis of Selected Primary Sources in Philippine History .....</b>  | <b>13</b> |
| A Brief Summary of the <i>First Voyage Around the World by Magellan</i> by Antonio Pigafetta .....  | 14        |
| Analysis of Pigafetta's Chronicle .....   | 20        |
| The KKK and the "Kartilya ng Katipunan" .....   | 22        |
| Analysis of the "Kartilya ng Katipunan" .....   | 24        |
| Reading the "Proclamation of the Philippine Independence" .....   | 26        |
| Analysis of the "Proclamation of the Philippine Independence" .....   | 29        |
| A Glance at Selected Philippine Political Caricature in Alfred McCoy's <i>Philippine Cartoons: Political Caricature of the American Era (1900-1941)</i> ..... | 31        |
| Analysis of the Political Caricatures during the American Period .....  | 34        |
| Revisiting Corazon Aquino's Speech Before the U.S. Congress .....   | 36        |
| Analysis of Cory Aquino's Speech .....  | 41        |



|                  |  |           |
|------------------|--|-----------|
| <b>Chapter 3</b> | <b>Philippine History: Spaces for Conflict and Controversies .....</b>               | <b>45</b> |
|                  | Making Sense of the Past: Historical Interpretation.....                             | 46        |
|                  | Multiperspectivity.....  | 48        |
|                  | Case Study 1: Where Did the First Catholic Mass Take Place in the Philippines? ..... | 49        |
|                  | Case Study 2: What Happened in the Cavite Mutiny? .....                              | 56        |
|                  | Spanish Accounts of the Cavite Mutiny.....   | 56        |
|                  | Differing Accounts of the Events of 1872.....  | 59        |
|                  | Case Study 3: Did Rizal Retract? .....   | 62        |
|                  | The Balaguer Testimony.....  | 63        |
|                  | The Testimony of <i>Cuerpo de Vigilancia</i> .....                                   | 63        |
|                  | Case Study 4: Where Did the Cry of Rebellion Happen? .....                           | 65        |
|                  | Different Dates and Places of the Cry.....   | 66        |

|                  |   |           |
|------------------|---|-----------|
| <b>Chapter 4</b> | <b>Social, Political, Economic, and Cultural Issues in Philippine History .....</b> | <b>71</b> |
|                  | Evolution of the Philippine Constitution.....                                       | 72        |
|                  | 1897: Constitution of Biak-na-Bato.....   | 72        |
|                  | 1899: Malolos Constitution.....   | 73        |
|                  | 1935: The Commonwealth Constitution .....   | 75        |
|                  | 1973: Constitutional Authoritarianism .....   | 76        |
|                  | 1987: Constitution After Martial Law .....  | 78        |
|                  | Attempts to Amend or Change the 1987 Constitution.....                              | 81        |
|                  | Policies on Agrarian Reform.....  | 84        |
|                  | Landownership in the Philippines under Spain .....                                  | 84        |
|                  | Landownership in the Philippines under the Americans .....                          | 85        |



|   |    |
|---|----|
| Post-War Interventions toward Agrarian Reform.....                | 87 |
| Agrarian Reform Efforts under Marcos .....                        | 89 |
| Post-1986 Agrarian Reform .....                                   | 91 |
| CARPER and the Future of Agrarian Reform in the Philippines ..... | 92 |
| Evolution of Philippine Taxation .....                            | 92 |
| Taxation in Spanish Philippines .....                             | 92 |
| Taxation under the Americans .....                                | 96 |
| Taxation during the Commonwealth Period .....                     | 97 |
| Fiscal Policy from 1946 to Present .....                          | 98 |

## Chapter 5

|   |     |
|---|-----|
| Doing History: A Guide for Students .....                             | 105 |
| Doing Historical Research Online .....                                | 106 |
| Doing Historical Research in Libraries and Archives.....              | 107 |
| Doing Life Histories and Biographical Research ....                   | 109 |
| Doing Local and Oral History.....                                     | 111 |
| Interacting with History through Historical Shrines and Museums ..... | 113 |
| Index .....   | 117 |



# Introduction

Reforms to the basic education system of the Philippines have resulted into the introduction of the K to 12 program, a much needed development since the Philippines has been the last country in Asia with a 10-year pre-university cycle. Globally, the accepted span of basic education is 12 years, and it is recognized as the standard for students and professionals.

With the lengthening of basic education, there is a need for higher education institutions to respond with the same enthusiasm in reforming their respective course offerings and programs. The Commission on Higher Education (CHED) approved the New General Education (GE) Program, which aims to restructure the old GE program in higher education institutions to respond to the challenges of the times. It is geared toward the holistic development of the person in overlapping realms of the individual, the Filipino community, and the global community.

It is in these realities that the General Education course *Readings in Philippine History* is situated, with the course description "Philippine history viewed from the lens of selected primary sources in different periods, analysis, and interpretations." The focus of the course is to develop historiographical skills connected to context and content analysis, applying both analytical strategies in themes and topics across the Philippine past. Primary sources will be the ultimate bridge between the past and the present, allowing spaces for students to simply not parrot facts about the past but to gain knowledge that can be used in proposing solutions to the problems of today.

The use of primary sources in studying about the past connects the history learner to the text producers themselves, allowing for a richer experience of understanding and appreciation. However, the use of primary sources for those who lack the sufficient training and knowledge could also be disastrous, and may be a source of misunderstanding and alienation to the events of the past. This book is crafted to provide a strategy on how to study Philippine history through primary sources, in hopes that the teacher and the student would have the best opportunity to learn and study about the past while taking great care in watching the steps they take in their attempt to utilize primary sources in history.



## Organization of the Book

This book is divided into five chapters:

*Chapter 1 – Introduction to History: Definition, Issues, Sources, and Methodology* is a general appraisal of history as a discipline and as a narrative. This chapter aims to introduce the students to history as a theoretical field, as well as discuss the historiographical method of the evaluation of primary sources.

*Chapter 2 – Content and Contextual Analysis of Selected Primary Sources in Philippine History* talks about the two methods of analysis mentioned as it applies to historical research, using primary sources from across the periods of Philippine history as exemplars of analysis.

*Chapter 3 – Philippine History: Spaces for Conflict and Controversies* attempts to dissect the issues surrounding historical interpretation—how a single record of the past can be interpreted in multiple ways and the challenges it poses to the students of history.

*Chapter 4 – Social, Political, Economic, and Cultural Issues in Philippine History* is centered on the attempt to understand current issues and concerns using the lens of history, in recognition of the fact that the problems of society today could well be addressed by looking at the roots of the problems. This chapter discusses the mandatory topics on the Philippine Constitution, agrarian reform, and taxation.

*Chapter 5 – Doing History: A Guide for Students* is an attempt by the authors to guide the students in the historical research methods they will have to undergo in the process of completing the course. This chapter recognizes the realities of the present generation and aims to use these realities to the advantage of the students in the process of learning history by doing history.



### **Note to Teachers**

For the teachers, remember that Philippine history is not set in stone; and only in continuous learning and updating historical knowledge can we make ourselves aware that the trends in knowledge of Philippine history is regularly changing. It is your responsibility to keep track of the discourse of the Philippine past and keep yourself knowledgeable to be able to provide your students with the best instruction and assistance in understanding our nation's narrative.

### **Note to Students**

For the students, it is high time you do away with the misconception that history is a boring field of study. You may have been victims of the stereotypes appropriated to history as it has been taught in the classroom for centuries. Realize that by studying history, we situate ourselves in the story of the nation, a necessary endeavor to be able to know more about our identity and find out how we can help solve the problems of today and move forward to the future.





# Chapter 1

## Introduction to History: Definition, Issues, Sources, and Methodology

### Learning Objectives:

- To understand the meaning of history as an academic discipline and to be familiar with the underlying philosophy and methodology of the discipline.
- To apply the knowledge in historical methodology and philosophy in assessing and analyzing existing historical narratives.
- To examine and assess critically the value of historical evidences and sources.
- To appreciate the importance of history in the social and national life of the Philippines.

This chapter introduces history as a discipline and as a narrative. It presents the definition of the history, which transcends the common definition of history as the study of the past. This chapter also discusses several issues in history that consequently opens up for the theoretical aspects of the discipline. The distinction between primary and secondary sources is also discussed in relation to the historical subject matter being studied and the historical methodology employed by the historian. Ultimately, this chapter also tackles the task of the historian as the arbiter of facts and evidences in making his interpretation and forming historical narrative.



## Definition and Subject Matter

History has always been known as the study of the past. Students of general education often dread the subject for its notoriety in requiring them to memorize dates, places, names, and events from distant eras. This low appreciation of the discipline may be rooted from the shallow understanding of history's relevance to their lives and to their respective contexts. While the popular definition of history as the study of the past is not wrong, it does not give justice to the complexity of the subject and its importance to human civilization.

History was derived from the Greek word *historia* which means "knowledge acquired through inquiry or investigation." History as a discipline existed for around 2,400 years and is as old as mathematics and philosophy. This term was then adapted to classical Latin where it acquired a new definition. *Historia* became known as the account of the past of a person or of a group of people through written documents and historical evidences. That meaning stuck until the early parts of the twentieth century. History became an important academic discipline. It became the historian's duty to write about the lives of important individuals like monarchs, heroes, saints, and nobilities. History was also focused on writing about wars, revolutions, and other important breakthroughs. It is thus important to ask: What counts as history? Traditional historians lived with the mantra of "no document, no history." It means that unless a written document can prove a certain historical event, then it cannot be considered as a historical fact.

But as any other academic disciplines, history progressed and opened up to the possibility of valid historical sources, which were not limited to written documents, like government records, chroniclers' accounts, or personal letters. Giving premium to written documents essentially invalidates the history of other civilizations that do not keep written records. Some were keener on passing their history by word of mouth. Others got their historical documents burned or destroyed in the events of war or colonization. Restricting historical evidence as exclusively written is also discrimination against other social classes who were not recorded in paper. Nobilities, monarchs, the elite, and even the middle class would have their birth, education, marriage, and death as matters of government and historical record. But what of peasant families or indigenous groups who











One of the problems confronted by history is the accusation that the history is always written by victors. This connotes that the narrative of the past is always written from the bias of the powerful and the more dominant player. For instance, the history of the Second World War in the Philippines always depicts the United States as the hero and the Imperial Japanese Army as the oppressors. Filipinos who collaborated with the Japanese were lumped in the category of traitors or collaborators. However, a more thorough historical investigation will reveal a more nuanced account of the history of that period instead of a simplified narrative as a story of hero versus villain.

## History and the Historian

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If history is written with agenda or is heavily influenced by the historian, is it possible to come up with an absolute historical truth? Is history an objective discipline? If it is not, is it still worthwhile to study history? These questions have haunted historians for many generations. Indeed, an exact and accurate account of the past is impossible for the very simple reason that we cannot go back to the past. We cannot access the past directly as our subject matter. Historians only get to access representation of the past through historical sources and evidences.

Therefore, it is the historian's job not just to seek historical evidences and facts but also to interpret these facts. "Facts cannot speak for themselves." It is the job of the historian to give meaning to these facts and organize them into a timeline, establish causes, and write history. Meanwhile, the historian is not a blank paper who mechanically interprets and analyzes present historical fact. He is a person of his own who is influenced by his own context, environment, ideology, education, and influences, among others. In that sense, his interpretation of the historical fact is affected by his context and circumstances. His subjectivity will inevitably influence the process of his historical research: the methodology that he will use, the facts that he shall select and deem relevant, his interpretation, and even the form of his writings. Thus, in one way or another, history is always subjective. If that is so, can history still be considered as an academic and scientific inquiry?

Historical research requires rigor. Despite the fact that historians cannot ascertain absolute objectivity, the study of history remains scientific because of the rigor of research and methodology that historians employ. *Historical methodology* comprises certain techniques and rules that



historians follow in order to properly utilize sources and historical evidences in writing history. Certain rules apply in cases of conflicting accounts in different sources, and on how to properly treat eyewitness accounts and oral sources as valid historical evidence. In doing so, historical claims done by historians and the arguments that they forward in their historical writings, while may be influenced by the historian's inclinations, can still be validated by using reliable evidences and employing correct and meticulous historical methodology.

The Annales School of History is a school of history born in France that challenged the canons of history. This school of thought did away with the common historical subjects that were almost always related to the conduct of states and monarchs. Annales scholars like Lucien Febvre, Marc Bloch, Fernand Braudel, and Jacques Le Goff studied other subjects in a historical manner. They were concerned with social history and studied longer historical periods. For example, Annales scholars studied the history of peasantry, the history of medicine, or even the history of environment. The history from below was pioneered by the same scholars. They advocated that the people and classes who were not reflected in the history of the society in the grand manner be provided with space in the records of mankind. In doing this, Annales thinkers married history with other disciplines like geography, anthropology, archaeology, and linguistics.

For example, if a historian chooses to use an oral account as his data in studying the ethnic history of the Ifugaos in the Cordilleras during the American Occupation, he needs to validate the claims of his informant through comparing and corroborating it with written sources. Therefore, while bias is inevitable, the historian can balance this out by relying to evidences that back up his claim. In this sense, the historian need not let his bias blind his judgment and such bias is only acceptable if he maintains his rigor as a researcher.

## Historical Sources

With the past as history's subject matter, the historian's most important research tools are historical sources. In general, historical sources can be classified between primary and secondary sources. The classification of sources between these two categories depends on the historical subject being



studied. *Primary sources* are those sources produced at the same time as the event, period, or subject being studied. For example, if a historian wishes to study the Commonwealth Constitution Convention of 1935, his primary sources can include the minutes of the convention, newspaper clippings, Philippine Commission reports of the U.S. Commissioners, records of the convention, the draft of the Constitution, and even photographs of the event. Eyewitness accounts of convention delegates and their memoirs can also be used as primary sources. The same goes with other subjects of historical study. Archival documents, artifacts, memorabilia, letters, census, and government records, among others are the most common examples of primary sources.

On the other hand, *secondary sources* are those sources, which were produced by an author who used primary sources to produce the material. In other words, secondary sources are historical sources, which studied a certain historical subject. For example, on the subject of the Philippine Revolution of 1896, students can read Teodoro Agoncillo's *Revolt of the Masses: The Story of Bonifacio and the Katipunan* published originally in 1956. The Philippine Revolution happened in the last years of the nineteenth century while Agoncillo published his work in 1956, which makes the *Revolt of the Masses* a secondary source. More than this, in writing the book, Agoncillo used primary sources with his research like documents of the Katipunan, interview with the veterans of the Revolution, and correspondence between and among Katipuneros.

However, a student should not be confused about what counts as a primary or a secondary source. As mentioned above, the classification of sources between primary and secondary depends not on the period when the source was produced or the type of the source but on the subject of the historical research. For example, a textbook is usually classified as a secondary source, a tertiary source even. However, this classification is usual but not automatic. If a historian chooses to write the history of education in the 1980s, he can utilize textbooks used in that period as a primary source. If a historian wishes to study the historiography of the Filipino-American War for example, he can use works of different authors on the topic as his primary source as well.

Both primary and secondary sources are useful in writing and learning history. However, historians and students of history need to thoroughly



scrutinize these historical sources to avoid deception and to come up with the historical truth. The historian should be able to conduct an external and internal criticism of the source, especially primary sources which can age in centuries. *External criticism* is the practice of verifying the authenticity of evidence by examining its physical characteristics; consistency with the historical characteristic of the time when it was produced; and the materials used for the evidence. Examples of the things that will be examined when conducting external criticism of a document include the quality of the paper, the type of the ink, and the language and words used in the material, among others.

*Internal criticism*, on the other hand, is the examination of the truthfulness of the evidence. It looks at the content of the source and examines the circumstance of its production. Internal criticism looks at the truthfulness and factuality of the evidence by looking at the author of the source, its context, the agenda behind its creation, the knowledge which informed it, and its intended purpose, among others. For example, Japanese reports and declarations during the period of the war should not be taken as a historical fact hastily. Internal criticism entails that the historian acknowledge and analyze how such reports can be manipulated to be used as war propaganda. Validating historical sources is important because the use of unverified, falsified, and untruthful historical sources can lead to equally false conclusions. Without thorough criticisms of historical evidences, historical deceptions and lies will be highly probable.

One of the most scandalous cases of deception in Philippine history is the hoax Code of Kalantiaw. The code was a set of rules contained in an epic, *Maragtas*, which was allegedly written by a certain Datu Kalantiaw. The document was sold to the National Library and was regarded as an important precolonial document until 1968, when American historian William Henry Scott debunked the authenticity of the code due to anachronism and lack of evidence to prove that the code existed in the precolonial Philippine society. Ferdinand Marcos also claimed that he was a decorated World War II soldier who led a guerilla unit called Ang Maharlika. This was widely believed by students of history and Marcos had war medals to show. This claim, however, was disproven when historians counterchecked Marcos's claims with the war records of the United States. These cases prove how deceptions can propagate without rigorous historical research.



The task of the historian is to look at the available historical sources and select the most relevant and meaningful for history and for the subject matter that he is studying. History, like other academic discipline, has come a long way but still has a lot of remaining tasks to do. It does not claim to render absolute and exact judgment because as long as questions are continuously asked, and as long as time unfolds, the study of history can never be complete. The task of the historian is to organize the past that is being created so that it can offer lessons for nations, societies, and civilization. It is the historian's job to seek for the meaning of recovering the past to let the people see the continuing relevance of provenance, memory, remembering, and historical understanding for both the present and the future.

**Philippine historiography** underwent several changes since the precolonial period until the present. Ancient Filipinos narrated their history through communal songs and epics that they passed orally from a generation to another. When the Spaniards came, their chroniclers started recording their observations through written accounts. The perspective of historical writing and inquiry also shifted. The Spanish colonizers narrated the history of their colony in a bipartite view. They saw the age before colonization as a dark period in the history of the islands, until they brought light through Western thought and Christianity. Early nationalists refuted this perspective and argued the tripartite view. They saw the precolonial society as a luminous age that ended with darkness when the colonizers captured their freedom. They believed that the light would come again once the colonizers were evicted from the Philippines. Filipino historian Zeus Salazar introduced the new guiding philosophy for writing and teaching history: *pantayong pananaw* (for us—from us perspective). This perspective highlights the importance of facilitating an internal conversation and discourse among Filipinos about our own history, using the language that is understood by everyone.



## Chapter Exercises

A. **True or False.** Write **true** if the statement is true. Otherwise, write **false** in the space provided.

- \_\_\_\_\_ 1. History is the study of the past.
- \_\_\_\_\_ 2. Historical sources that were not written should not be used in writing history.
- \_\_\_\_\_ 3. The subject of historiography is history itself.
- \_\_\_\_\_ 4. History has no use for the present, thus, the saying "past is past" is true.
- \_\_\_\_\_ 5. History is limited to the story of a hero versus a villain.
- \_\_\_\_\_ 6. Only primary sources may be used in writing history.
- \_\_\_\_\_ 7. There are three types of sources: primary, secondary, and tertiary sources.
- \_\_\_\_\_ 8. External criticism is done by examining the physical characteristics of a source.
- \_\_\_\_\_ 9. Internal criticism is done by looking at a source's quality of paper and type of ink, among others.
- \_\_\_\_\_ 10. The historians are the only source of history.

B. **What Source?** Read the following scenarios and classify the sources discovered as **primary**, **secondary**, or **tertiary** sources. Write your answer in the space provided.

1. Jose was exploring the library in his new school in Manila. He wanted to study the history of Calamba, Laguna during the nineteenth century. In one of the books, he saw an old photograph of a woman standing in front of an old church, clipped among the pages. At the back of the photo was a fine inscription that says "*Kalamba, 19 de Junio 1861.*"

Is the photograph a primary, secondary, or a tertiary source?

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5. Gregoria loved to travel around the country. She liked bringing with her a travel brochure that informs her of the different sites worth visiting in the area. Her travel brochure was usually produced by the tourism department of the province. It shows pictures of destinations visited by tourists and a few basic information about the place like the origin of the name, the historical significance of the place, and some other information acquired by the office's researchers and writers.

Is the travel brochure a primary, secondary, or a tertiary source?

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- C. **My Primary Source.** Using the examples of a primary source in this chapter, bring a primary source that can be used in the writing of your life history. Present this in class and discuss how it qualifies as a primary source.

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there is another very hard, and thicker than that of a walnut. They burn this second rind, and make with it a powder which is useful to them. Under this rind there is a white marrow of a finger's thickness, which they eat fresh with meat and fish, as we do bread, and it has the taste of an almond, and if anyone dried it he might make bread of it (p. 72)."

Pigafetta characterized the people as "very familiar and friendly" and willingly showed them different islands and the names of these islands. The fleet went to Humunu Island (Homonhon) and there they found what Pigafetta referred to as the "Watering Place of Good Signs." It is in this place where Pigafetta wrote that they found the first signs of gold in the island. They named the island with the nearby islands as the archipelago of St. Lazarus. They left the island, then on March 25th, Pigafetta recounted that they saw two *ballanghai* (balangay), a long boat full of people in Mazzava/Mazaua. The leader, who Pigafetta referred to as the king of the *ballanghai* (balangay), sent his men to the ship of Magellan. The Europeans entertained these men and gave them gifts. When the king of the balangay offered to give Magellan a bar of gold and a chest of ginger, Magellan declined. Magellan sent the interpreter to the king and asked for money for the needs of his ships and expressed that he came into the islands as a friend and not as an enemy. The king responded by giving Magellan the needed provisions of food in chinaware. Magellan exchanged gifts of robes in Turkish fashion, red cap, and gave the people knives and mirrors. The two then expressed their desire to become brothers. Magellan also boasted of his men in armor who could not be struck with swords and daggers. The king was fascinated and remarked that men in such armor could be worth one hundred of his men. Magellan further showed the king his other weapons, helmets, and artilleries. Magellan also shared with the king his charts and maps and shared how they found the islands.

After a few days, Magellan was introduced to the king's brother who was also a king of another island. They went to this island and Pigafetta reported that they saw mines of gold. The gold was abundant that parts of the ship and of the house of the second king were made of gold. Pigafetta described this king as the most handsome of all the men that he saw in this place. He was also adorned with silk and gold accessories like a golden dagger, which he carried with him in a wooden polished sheath. This king was named Raia Calambu, king of Zuluana and Calagan (Butuan and Caragua), and the first king was Raia Siagu. On March 31st, which happened to be Easter Sunday, Magellan ordered the chaplain to preside a Mass by the shore. The king







that he would; but as the king wished to keep up the custom, let him begin and make a present, and then the captain would do his duty."

The following day, Magellan spoke before the people of Cebu about peace and God. Pigafetta reported that the people took pleasure in Magellan's speech. Magellan then asked the people who would succeed the king after his reign and the people responded that the eldest child of the king, who happened to be a daughter, would be the next in line. Pigafetta also related how the people talked about, how at old age, parents were no longer taken into account and had to follow the orders of their children as the new leaders of the land. Magellan responded to this by saying that his faith entailed children to render honor and obedience to their parents. Magellan preached about their faith further and people were reportedly convinced. Pigafetta wrote that their men were overjoyed seeing that the people wished to become Christians through their free will and not because they were forced or intimidated.

On the 14th of April, the people gathered with the king and other principal men of the islands. Magellan spoke to the king and encouraged him to be a good Christian by burning all of the idols and worship the cross instead. The king of Cebu was then baptized as a Christian. Pigafetta wrote:

"To that the king and all his people answered that thy would obey the commands of the captain and do all that he told them. The captain took the king by the hand, and they walked about on the scaffolding, and when he was baptized he said that he would name him Don Charles (Carlos), as the emperor his sovereign was named; and he named the prince Don Fernand (Fernando), after the brother of the emperor, and the King of Mazavva, Jehan: to the Moor he gave the name of Christopher, and to the others each a name of his fancy."

After eight days, Pigafetta counted that all of the island's inhabitant were already baptized. He admitted that they burned a village down for obeying neither the king nor Magellan. The Mass was conducted by the shore every day. When the queen came to the Mass one day, Magellan gave her an image of the Infant Jesus made by Pigafetta himself. The king of Cebu swore that he would always be faithful to Magellan. When Magellan reiterated that all of the newly baptized Christians need to burn their idols, but the natives gave excuses telling Magellan that they needed the idols to heal a sick man who was a relative to the king. Magellan insisted that they should instead put their faith in Jesus Christ. They went to the sick man







safety, as though his obstinate fight had no other object than to give an opportunity for the retreat of his men."

Pigafetta also said that the king of Cebu who was baptized could have sent help but Magellan instructed him not to join the battle and stay in the *balangay* so that he would see how they fought. The king offered the people of Mactan gifts of any value and amount in exchange of Magellan's body but the chief refused. They wanted to keep Magellan's body as a memento of their victory.

Magellan's men elected Duarte Barbosa as the new captain. Pigafetta also told how Magellan's slave and interpreter named Henry betrayed them and told the king of Cebu that they intended to leave as quickly as possible. Pigafetta alleged that the slave told the king that if he followed the slave's advice, then the king could acquire the ships and the goods of Magellan's fleet. The two conspired and betrayed what was left of Magellan's men. The king invited these men to a gathering where he said he would present the jewels that he would send for the King of Spain. Pigafetta was not able to join the twenty-four men who attended because he was nursing his battle wounds. It was only a short time when they heard cries and lamentations. The natives had slain all of the men except the interpreter and Juan Serrano who was already wounded. Serrano was presented and shouted at the men in the ship asking them to pay ransom so he would be spared. However, they refused and would not allow anyone to go to the shore. The fleet departed and abandoned Serrano. They left Cebu and continued their journey around the world.

### *Analysis of Pigafetta's Chronicle*

The chronicle of Pigafetta was one of the most cited documents by historians who wished to study the precolonial Philippines. As one of the earliest written accounts, Pigafetta was seen as a credible source for a period, which was prior unchronicled and undocumented. Moreover, being the earliest detailed documentation, it was believed that Pigafetta's writings account for the "purest" precolonial society. Indeed, Pigafetta's work is of great importance in the study and writing of Philippine history. Nevertheless, there needs to have a more nuanced reading of the source within a contextual backdrop. A student of history should recognize certain biases accompanying the author and his identity, loyalties, and the circumstances that he was in; and how it affected the text that he produced. In the case of Pigafetta, the reader needs to understand that he was a chronicler commissioned by the











































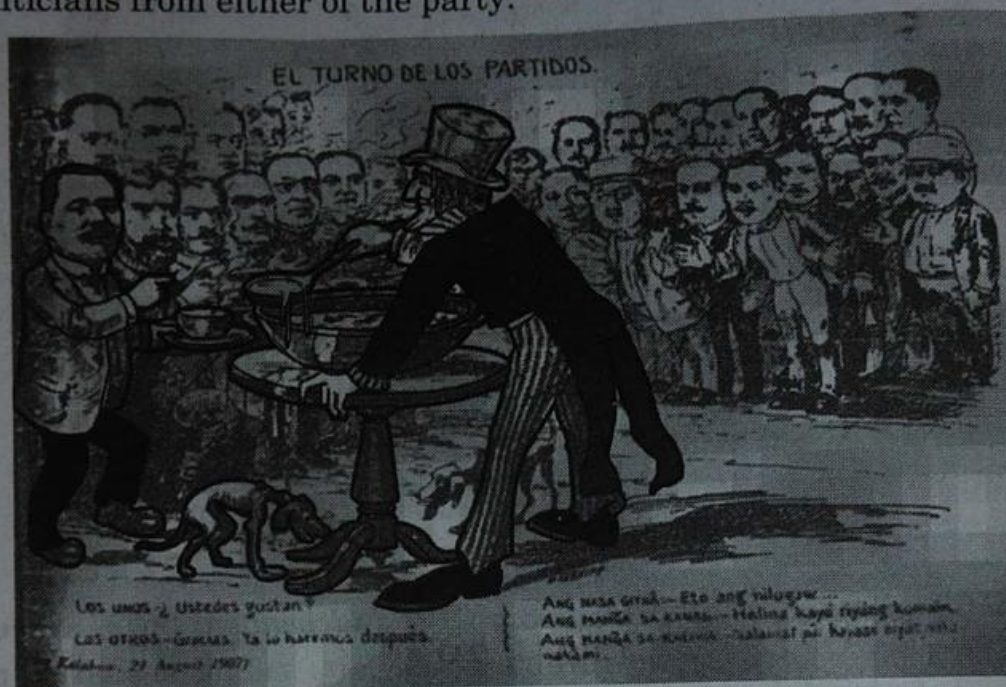








The last cartoon was published by *Lipang Kalabaw* on 24 August 1907. In the picture, we can see Uncle Sam rationing porridge to the politicians and members of the *Progresista Party* (sometimes known as the *Federalista Party*) while members of the *Nacionalista Party* look on and wait for their turn. This cartoon depicts the patronage of the United States being coveted by politicians from either of the party.



### ***Analysis of the Political Caricatures during the American Period***

The transition from the Spanish Colonial period to the American Occupation period demonstrated different strands of changes and shifts in culture, society, and politics. The Americans drastically introduced democracy to the nascent nation and the consequences were far from ideal. Aside from this, it was also during the American period that Filipinos were introduced to different manifestations of modernity like healthcare, modern transportation, and media. This ushered in a more open and freer press. The post-independence and the post-Filipino-American period in the Philippines were experienced differently by Filipinos coming from different classes. The upper *principalia* class experienced economic prosperity with the opening up of the Philippine economy to the United States but the majority of the poor Filipino remained poor, desperate, and victims of state repression.

The selected cartoons illustrate not only the opinion of certain media outfits about the Philippine society during the American period but also paint a broad image of society and politics under the United States. In the arena of















































































The **GOMBURZA** is the collective name of the three martyred priests Mariano Gomez, Jose Burgos, and Jacinto Zamora, who were tagged as the masterminds of the Cavite Mutiny. They were prominent Filipino priests charged with treason and sedition. It is believed that the Spanish clergy connected the priests to the mutiny as part of a conspiracy to stifle the movement of secular priests who desired to have their own parishes instead of being merely assistants to the regular friars. The GOMBURZA were executed by garrote in public, a scene purportedly witnessed by a young Jose Rizal.

Their martyrdom is widely accepted as the dawn of Philippine nationalism in the nineteenth century, with Rizal dedicating his second novel, *El Filibusterismo*, to their memory:

"The Government, by enshrouding your trial in mystery and pardoning your co-accused, has suggested that some mistake was committed when your fate was decided; and the whole of the Philippines, in paying homage to your memory and calling you martyrs, totally rejects your guilt. The Church, by refusing to degrade you, has put in doubt the crime charged against you."

### Case Study 3: Did Rizal Retract?

Jose Rizal is identified as a hero of the revolution for his writings that center on ending colonialism and liberating Filipino minds to contribute to creating the Filipino nation. The great volume of Rizal's lifework was committed to this end, particularly the more influential ones, *Noli Me Tangere* and *El Filibusterismo*. His essays vilify not the Catholic religion, but the friars, the main agents of injustice in the Philippine society.

It is understandable, therefore, that any piece of writing from Rizal that recants everything he wrote against the friars and the Catholic Church in the Philippines could deal heavy damage to his image as a prominent Filipino revolutionary. Such document purportedly exists, allegedly signed by Rizal a few hours before his execution. This document, referred to as "The Retraction," declares Rizal's belief in the Catholic faith, and retracts everything he wrote against the Church.

#### Primary Source: Rizal's Retraction

Source: Translated from the document found by Fr. Manuel Garcia,





The retraction of Rizal remains to this day, a controversy; many scholars, however, agree that the document does not tarnish the heroism of Rizal. His relevance remained solidified to Filipinos and pushed them to continue the revolution, which eventually resulted in independence in 1898.

**Rizal's Connection to the Katipunan** is undeniable—in fact, the precursor of the Katipunan as an organization is the *La Liga Filipina*, an organization Rizal founded, with Andres Bonifacio as one of its members. But *La Liga Filipina* was short-lived as the Spaniards exiled Rizal to Dapitan. Former members decided to band together to establish the Katipunan a few days after Rizal's exile on 7 July 1892.

Rizal may not have been officially part of the Katipunan, but the Katipuneros showed great appreciation of his work toward the same goals. Out of the 28 members of the leadership of the Katipunan (known as the *Kataas-taasang Sanggunian ng Katipunan*) from 1892 to 1896, 13 were former members of *La Liga Filipina*. Katipuneros even used Rizal's name as a password.

In 1896, the Katipuneros decided to inform Rizal of their plans to launch the revolution, and sent Pio Valenzuela to visit Rizal in Dapitan. Valenzuela's accounts of his meeting with Rizal have been greatly doubted by many scholars, but according to him, Rizal objected to the plans, saying that doing so would be tantamount to suicide since it would be difficult to fight the Spaniards who had the advantage of military resources. He added that the leaders of the Katipunan must do everything they could to prevent the spilling of Filipino blood. Valenzuela informed Rizal that the revolution could inevitably break out if the Katipunan were to be discovered by the Spaniards. Rizal advised Valenzuela that the Katipunan should first secure the support of wealthy Filipinos to strengthen their cause, and suggested that Antonio Luna be recruited to direct the military movement of the revolution.

#### Case Study 4: Where Did the Cry of Rebellion Happen?

Momentous events swept the Spanish colonies in the late nineteenth century, including the Philippines. Journalists of the time referred to the phrase "*El Grito de Rebelion*" or "Cry of Rebellion" to mark the start of these revolutionary events, identifying the places where it happened. In the Philippines, this happened in August 1896, northeast of Manila, where they declared rebellion against the Spanish colonial government. These events





On August 26th, a big meeting was held in Balintawak, at the house of Apolonio Samson, then cabeza of that barrio of Caloocan. Among those who attended, I remember, were Bonifacio, Emilio Jacinto, Aguedo del Rosario, Tomas Remigio, Briccio Pantas, Teodoro Plata, Pio Valenzuela, Enrique Pacheco, and Francisco Carreon. They were all leaders of the Katipunan and composed the board of directors of the organization. Delegates from Bulacan, Cabanatuan, Cavite, and Morong were also present.

At about nine o'clock in the morning of August 26, the meeting was opened with Andres Bonifacio presiding and Emilio Jacinto acting as secretary. The purpose was to discuss when the uprising was to take place. Teodoro Plata, Briccio Pantas, and Pio Valenzuela were all opposed to starting the revolution too early... Andres Bonifacio, sensing that he would lose in the discussion then, left the session hall and talked to the people, who were waiting outside for the result of the meeting of the leaders. He told the people that the leaders were arguing against starting the revolution early, and appealed to them in a fiery speech in which he said: "You remember the fate of our countrymen who were shot in Bagumbayan. Should we return now to the towns, the Spaniards will only shoot us. Our organization has been discovered and we are all marked men. If we don't start the uprising, the Spaniards will get us anyway. What then, do you say?"

"Revolt!" the people shouted as one.

Bonifacio then asked the people to give a pledge that they were to revolt. He told them that the sign of slavery of the Filipinos were (sic) the cedula tax charged each citizen. "If it is true that you are ready to revolt... I want to see you destroy your cedulas. It will be a sign that all of us have declared our severance from the Spaniards."

*Pio Valenzuela*

Source: Pio Valenzuela, "Cry of Pugad Lawin," in Gregorio Zaide and Sonia Zaide, *Documentary Sources of Philippine History*, Volume 8 (Manila: National Book Store, 1990), 301-302.

The first place of refuge of Andres Bonifacio, Emilio Jacinto, Procopio Bonifacio, Teodoro Plata, Aguedo del Rosario, and myself was Balintawak, the first five arriving there on August 19, and I, on August 20, 1896. The first place where some 500 members of the Katipunan met on August 22, 1896, was the house and yard of Apolonio Samson at



Kangkong. Aside from the persons mentioned above, among those who were there were Briccio Pantas, Alejandro Santiago, Ramon Bernardo, Apolonio Samson, and others. Here, views were only exchanged, and no resolution was debated or adopted. It was at Pugad Lawin, the house, store-house, and yard of Juan Ramos, son of Melchora Aquino, where over 1,000 members of the Katipunan met and carried out considerable debate and discussion on August 23, 1896. The discussion was on whether or not the revolution against the Spanish government should be started on August 29, 1896... After the tumultuous meeting, many of those present tore their cedula certificates and shouted "Long live the Philippines! Long live the Philippines!"

From the eyewitness accounts presented, there is indeed marked disagreement among historical witnesses as to the place and time of the occurrence of the Cry. Using primary and secondary sources, four places have been identified: Balintawak, Kangkong, Pugad Lawin, and Bahay Toro, while the dates vary: 23, 24, 25, or 26 August 1896.

Valenzuela's account should be read with caution: He once told a Spanish investigator that the "Cry" happened in Balintawak on Wednesday, 26 August 1896. Much later, he wrote in his *Memoirs of the Revolution* that it happened at Pugad Lawin on 23 August 1896. Such inconsistencies in accounts should always be seen as a red flag when dealing with primary sources.

According to Guerrero, Encarnacion, and Villegas, all these places are in Balintawak, then part of Caloocan, now, in Quezon City. As for the dates, Bonifacio and his troops may have been moving from one place to another to avoid being located by the Spanish government, which could explain why there are several accounts of the Cry.



## Chapter Exercises

A. **True or False.** Write **true** if the statement is true. Otherwise, write **false** in the space provided.

- \_\_\_\_\_ 1. Historical interpretation is based on the historian's judgment on how the past should be seen.
- \_\_\_\_\_ 2. We make sense of the past through historical interpretation.
- \_\_\_\_\_ 3. Multiperspectivity is a quality of historical writing attributed to a variety of lenses that may be used to view the past.
- \_\_\_\_\_ 4. There is only one account of the First Catholic Mass in the Philippines.
- \_\_\_\_\_ 5. The significance of the martyrdom of the GOMBURZA is questioned by historians.
- \_\_\_\_\_ 6. The Cavite Mutiny is an event that led to the execution of the GOMBURZA.
- \_\_\_\_\_ 7. Jose Rizal's essays go against the Catholic faith.
- \_\_\_\_\_ 8. There is no doubt that Rizal retracted his writings to be able to marry Josephine Bracken.
- \_\_\_\_\_ 9. The Cry of the Rebellion happened in present-day Quezon City.
- \_\_\_\_\_ 10. The site of the monument to the Heroes of 1896 was chosen because this is the actual place where the Cry of the Rebellion happened.

B. **Symposium on Historical Controversy.** Organize a symposium on a particular historical controversy of your choice. Invite a local or national expert to discuss his or her views on the controversy. After the event, write a reaction paper on your experience in organizing and attending the symposium.



- C. **Debate on Historical Controversies.** Form groups with four to five members. Each group will be assigned with a particular historical controversy discussed in this chapter and a corresponding stance (affirmative or negative). The groups should be able to use primary sources in defending their side.

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# Chapter 4

## Social, Political, Economic, and Cultural Issues in Philippine History

### Learning Objectives:

- To analyze social, political, economic, and cultural issues in the Philippines using the lens of history.
- To recognize that the problems of today are consequences of decisions and events that happened in the past.
- To understand several enduring issues in Philippine society through history.
- To propose recommendations or solutions to present-day problems based on the understanding of the past and anticipation of the future through the study of history.

This chapter is dedicated to enduring issues in Philippine society, which history could lend a hand in understanding, and hopefully, proposing solutions. These topics include the mandated discussion on the Philippine constitution, policies on agrarian reform, and taxation. It is hoped that these discussions will help us propose recommendations or solutions to present-day problems based on our understanding of root causes and how we anticipate future scenarios in the Philippine setting.



## Evolution of the Philippine Constitution

The constitution is defined as a set of fundamental principles or established precedents according to which a state or other organization is governed, thus, the word itself means to be a part of a whole, the coming together of distinct entities into one group, with the same principles and ideals. These principles define the nature and extent of government.

The Constitution of the Philippines, the supreme law of the Republic of the Philippines, has been in effect since 1987. There were only three other constitutions that have effectively governed the country: the 1935 Commonwealth Constitution, the 1973 Constitution, and the 1986 Freedom Constitution. However, there were earlier constitutions attempted by Filipinos in the struggle to break free from the colonial yoke.

### ***1897: Constitution of Biak-na-Bato***

The Constitution of Biak-na-Bato was the provisional Constitution of the Philippine Republic during the Philippine Revolution, and was promulgated by the Philippine Revolutionary Government on 1 November 1897. The constitution, borrowed from Cuba, was written by Isabelo Artacho and Félix Ferrer in Spanish, and later on, translated into Tagalog.

The organs of the government under the Constitution were: (1) the Supreme Council, which was vested with the power of the Republic, headed by the president and four department secretaries: the interior, foreign affairs, treasury, and war; (2) the *Consejo Supremo de Gracia Y Justicia* (Supreme Council of Grace and Justice), which was given the authority to make decisions and affirm or disprove the sentences rendered by other courts and to dictate rules for the administration of justice; and (3) the *Asamblea de Representantes* (Assembly of Representatives), which was to be convened after the revolution to create a new Constitution and to elect a new Council of Government and Representatives of the people.

The Constitution of Biak-na-Bato was never fully implemented, since a truce, the Pact of Biak-na-Bato, was signed between the Spanish and the Philippine Revolutionary Army.

### **Primary Source: Preamble of the Biak-na-Bato Constitution**

The separation of the Philippines from the Spanish monarchy and their formation into an independent state with its own government called the Philippine Republic has been the end sought by the Revolution in the



existing war, begun on the 24th of August, 1896; and, therefore, in its name and by the power delegated by the Filipino people, interpreting faithfully their desires and ambitions, we the representatives of the Revolution, in a meeting at Biak-na-bato, November 1, 1897, unanimously adopted the following articles for the constitution of the State.

### ***1899: Malolos Constitution***

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After the signing of the truce, the Filipino revolutionary leaders accepted a payment from Spain and went to exile in Hong Kong. Upon the defeat of the Spanish to the Americans in the Battle of Manila Bay on 1 May 1898, the United States Navy transported Aguinaldo back to the Philippines. The newly reformed Philippine revolutionary forces reverted to the control of Aguinaldo, and the Philippine Declaration of Independence was issued on 12 June 1898, together with several decrees that formed the First Philippine Republic. The Malolos Congress was elected, which selected a commission to draw up a draft constitution on 17 September 1898, which was composed of wealthy and educated men.

The document they came up with, approved by the Congress on 29 November 1898, and promulgated by Aguinaldo on 21 January 1899, was titled "The Political Constitution of 1899" and written in Spanish. The constitution has 39 articles divided into 14 titles, with eight articles of transitory provisions, and a final additional article. The document was patterned after the Spanish Constitution of 1812, with influences from the charters of Belgium, Mexico, Brazil, Nicaragua, Costa Rica, and Guatemala, and the French Constitution of 1793. According to Felipe Calderon, main author of the constitution, these countries were studied because they shared similar social, political, ethnological, and governance conditions with the Philippines. Prior constitutional projects in the Philippines also influenced the Malolos Constitution, namely, the *Kartilya* and the *Sanggunian-Hukuman*, the charter of laws and morals of the Katipunan written by Emilio Jacinto in 1896; the *Biak-na-Bato Constitution of 1897* planned by Isabelo Artacho; Mabini's *Constitutional Program of the Philippine Republic of 1898*; the provisional constitution of Mariano Ponce in 1898 that followed the Spanish constitutions; and the autonomy projects of Paterno in 1898.

#### **Primary Source: Preamble of the Political Constitution of 1899**

We, the Representatives of the Filipino People, lawfully convened, in order to establish justice, provide for common defense, promote the general welfare and insure the benefits of liberty, imploring the



aid of the Sovereign Legislator of the Universe for the attainment of these ends, have voted, decreed, and sanctioned the following political constitution.

As a direct challenge to colonial authorities of the Spanish empire, the sovereignty was retroverted to the people, a legal principle underlying the Philippine Revolution. The people delegated governmental functions to civil servants while they retained actual sovereignty. The 27 articles of Title IV detail the natural rights and popular sovereignty of Filipinos, the enumeration of which does not imply the prohibition of any other rights not expressly stated. Title III, Article V also declares that the State recognizes the freedom and equality of all beliefs, as well as the separation of Church and State. These are direct reactions to features of the Spanish government in the Philippines, where the friars were dominant agents of the state.

The form of government, according to Title II, Article 4 is to be popular, representative, alternative, and responsible, and shall exercise three distinct powers—legislative, executive, and judicial. The legislative power was vested in a unicameral body called the Assembly of Representatives, members of which are elected for terms of four years. Secretaries of the government were given seats in the assembly, which meet annually for a period of at least three months. Bills could be introduced either by the president or by a member of the assembly. Some powers not legislative in nature were also given to the body, such as the right to select its own officers, right of censure and interpellation, and the right of impeaching the president, cabinet members, the chief justice of the Supreme Court, and the solicitor-general. A permanent commission of seven, elected by the assembly, and granted specific powers by the constitution, was to sit during the intervals between sessions of the assembly.

Executive power was vested in the president, and elected by a constituent assembly of the Assembly of Representatives and special representatives. The president will serve a term of four years without re-election. There was no vice president, and in case of a vacancy, a president was to be selected by the constituent assembly.

The 1899 Malolos Constitution was never enforced due to the ongoing war. The Philippines was effectively a territory of the United States upon the signing of the Treaty of Paris between Spain and the United States, transferring sovereignty of the Philippines on 10 December 1898.



## *1935: The Commonwealth Constitution*

It is worth mentioning that after the Treaty of Paris, the Philippines was subject to the power of the United States of America, effectively the new colonizers of the country. From 1898 to 1901, the Philippines would be placed under a military government until a civil government would be put into place.

Two acts of the United States Congress were passed that may be considered to have qualities of constitutionality. First was the Philippine Organic Act of 1902, the first organic law for the Philippine Islands that provided for the creation of a popularly elected Philippine Assembly. The act specified that legislative power would be vested in a bicameral legislature composed of the Philippine Commission as the upper house and the Philippine Assembly as lower house. Key provisions of the act included a bill of rights for Filipinos and the appointment of two non-voting Filipino Resident Commissioners of the Philippines as representative to the United States House of Representatives. The second act that functioned as a constitution was the Philippine Autonomy Act of 1916, commonly referred to as "Jones Law," which modified the structure of the Philippine government through the removal of the Philippine Commission, replacing it with a Senate that served as the upper house and its members elected by the Filipino voters, the first truly elected national legislature. It was also this Act that explicitly declared the purpose of the United States to end their sovereignty over the Philippines and recognize Philippine independence as soon as a stable government can be established.

In 1932, with the efforts of the Filipino independence mission led by Sergio Osmeña and Manuel Roxas, the United States Congress passed the Hare-Hawes-Cutting Act with the promise of granting Filipinos' independence. The bill was opposed by then Senate President Manuel L. Quezon and consequently, rejected by the Philippine Senate.

By 1934, another law, the Tydings-McDuffie Act, also known as the Philippine Independence Act, was passed by the United States Congress that provided authority and defined mechanisms for the establishment of a formal constitution by a constitutional convention. The members of the convention were elected and held their first meeting on 30 July 1934, with Claro M. Recto unanimously elected as president.

The constitution was crafted to meet the approval of the United States government, and to ensure that the United States would live up to its promise to grant independence to the Philippines.



### **Primary Source: Preamble of the 1935 Commonwealth**

The Filipino people, imploring the aid of Divine Providence, in order to establish a government that shall embody their ideals, conserve and develop the patrimony of the nation, promote the general welfare, and secure to themselves and their posterity the blessings of independence under a regime of justice, liberty, and democracy, do ordain and promulgate this constitution.

The constitution created the Commonwealth of the Philippines, an administrative body that governed the Philippines from 1935 to 1946. It is a transitional administration to prepare the country toward its full achievement of independence. It originally provided for a unicameral National Assembly with a president and vice president elected to a six-year term without re-election. It was amended in 1940 to have a bicameral Congress composed of a Senate and a House of Representatives, as well as the creation of an independent electoral commission, and limited the term of office of the president and vice president to four years, with one re-election. Rights to suffrage were originally afforded to male citizens of the Philippines who are twenty-one years of age or over and are able to read and write; this was later on extended to women within two years after the adoption of the constitution.

While the dominant influence in the constitution was American, it also bears traces of the Malolos Constitution, the German, Spanish, and Mexican constitutions, constitutions of several South American countries, and the unwritten English Constitution.

The draft of the constitution was approved by the constitutional convention on 8 February 1935, and ratified by then U.S. President Franklin B. Roosevelt on 25 March 1935. Elections were held in September 1935 and Manuel L. Quezon was elected President of the Commonwealth.

The Commonwealth was briefly interrupted by the events of the World War II, with the Japanese occupying the Philippines. Afterward, upon liberation, the Philippines was declared an independent republic on 4 July 1946.

### ***1973: Constitutional Authoritarianism***

In 1965, Ferdinand E. Marcos was elected president, and in 1967, Philippine Congress passed a resolution calling for a constitutional convention to change the 1935 Constitution. Marcos won the re-election in 1969, in a bid boosted by campaign overspending and use of government







Martial Law was lifted and authorized the President to legislate on his own on an emergency basis. An overwhelming majority would ratify further amendments succeeding. In 1980, the retirement age of members of the judiciary was extended to 70 years. In 1981, the parliamentary system was formally modified to a French-style, semi-presidential system where executive power was restored to the president, who was, once again, to be directly elected; an Executive Committee was to be created, composed of the Prime Minister and 14 others, that served as the president's Cabinet; and some electoral reforms were instituted. In 1984, the Executive Committee was abolished and the position of the vice president was restored.

After all the amendments introduced, the 1973 Constitution was merely a way for the President to keep executive powers, abolish the Senate, and by any means, never acted as a parliamentary system, instead functioned as an authoritarian presidential system, with all the real power concentrated in the hands of the president, with the backing of the constitution.

The situation in the 1980s had been very turbulent. As Marcos amassed power, discontent has also been burgeoning. The tide turned swiftly when in August 1983, Benigno Aquino Jr., opposition leader and regarded as the most credible alternative to President Marcos, was assassinated while under military escort immediately after his return from exile in the United States. There was widespread suspicion that the orders to assassinate Aquino came from the top levels of the government and the military. This event caused the coming together of the non-violent opposition against the Marcos authoritarian regime. Marcos was then forced to hold "snap" elections a year early, and said elections were marred by widespread fraud. Marcos declared himself winner despite international condemnation and nationwide protests. A small group of military rebels attempted to stage a coup, but failed; however, this triggered what came to be known as the EDSA People Power Revolution of 1986, as people from all walks of life spilled onto the streets. Under pressure from the United States of America, who used to support Marcos and his Martial Law, the Marcos family fled into exile. His opponent in the snap elections, Benigno Aquino Jr.'s widow, Corazon Aquino, was installed as president on 25 February 1986.

### 1987: Constitution After Martial Law

President Corazon Aquino's government had three options regarding the constitution: revert to the 1935 Constitution, retain the 1973 Constitution and be granted the power to make reforms, or start anew and



break from the "vestiges of a disgraced dictatorship." They decided to make a new constitution that, according to the president herself, should be "truly reflective of the aspirations and ideals of the Filipino people."

In March 1986, President Aquino proclaimed a transitional constitution to last for a year while a Constitutional Commission drafted a permanent constitution. This transitional constitution, called the Freedom Constitution, maintained many provisions of the old one, including in rewritten form the presidential right to rule by decree. In 1986, a constitutional convention was created, composed of 48 members appointed by President Aquino from varied backgrounds and representations. The convention drew up a permanent constitution, largely restoring the setup abolished by Marcos in 1972, but with new ways to keep the president in check, a reaction to the experience of Marcos's rule. The new constitution was officially adopted on 2 February 1987.

The Constitution begins with a preamble and eighteen self-contained articles. It established the Philippines as a "democratic republican State" where "sovereignty resides in the people and all government authority emanates from them." It allocates governmental powers among the executive, legislative, and judicial branches of the government.

The Executive branch is headed by the president and his cabinet, whom he appoints. The president is the head of the state and the chief executive, but his power is limited by significant checks from the two other co-equal branches of government, especially during times of emergency. This is put in place to safeguard the country from the experience of martial law despotism during the presidency of Marcos. In cases of national emergency, the president may still declare martial law, but not longer than a period of sixty days. Congress, through a majority vote, can revoke this decision, or extend it for a period that they determine. The Supreme Court may also review the declaration of martial law and decide if there were sufficient justifying facts for the act. The president and the vice president are elected at large by a direct vote, serving a single six-year term.

The legislative power resides in a Congress divided into two Houses: the Senate and the House of Representatives. The 24 senators are elected at large by popular vote, and can serve no more than two consecutive six-year terms. The House is composed of district representatives representing a particular geographic area and makes up around 80% of the total number of representatives. There are 234 legislative districts in the Philippines that elect their representatives to serve three-year terms. The 1987 Constitution



created a party-list system to provide spaces for the participation of under-represented community sectors or groups. Party-list representatives may fill up not more than 20% of the seats in the House.

Aside from the exclusive power of legislation, Congress may also declare war, through a two-thirds vote in both upper and lower houses. The power of legislation, however, is also subject to an executive check, as the president retains the power to veto or stop a bill from becoming a law. Congress may only override this power with a two-thirds vote in both houses.

The Philippine Court system is vested with the power of the judiciary, and is composed of a Supreme Court and lower courts as created by law. The Supreme Court is a 15-member court appointed by the president without the need to be confirmed by Congress. The appointment the president makes, however, is limited to a list of nominees provided by a constitutionally specified Judicial and Bar Council. The Supreme Court Justices may hear, on appeal, any cases dealing with the constitutionality of any law, treaty, or decree of the government, cases where questions of jurisdiction or judicial error are concerned, or cases where the penalty is sufficiently grave. It may also exercise original jurisdiction over cases involving government or international officials. The Supreme Court is also in charge of overseeing the functioning and administration of the lower courts and their personnel.

The Constitution also established three independent Constitutional Commissions, namely, the Civil Service Commission, a central agency in charge of government personnel; the Commission on Elections, mandated to enforce and administer all election laws and regulations; and the Commission on Audit, which examines all funds, transactions, and property accounts of the government and its agencies.

To further promote the ethical and lawful conduct of the government, the Office of the Ombudsman was created to investigate complaints that pertain to public corruption, unlawful behavior of public officials, and other public misconduct. The Ombudsman can charge public officials before the Sandiganbayan, a special court created for this purpose.

**Changing the Constitution** is a perennial issue that crops up, and terms such as "Cha-Cha," "Con-Ass," and "Con-Con" are regularly thrown around. Article XVII of the 1987 Constitution provides for three ways by which the Constitution can be changed.

Congress (House of Representatives and the Senate) may convene as a Constituent Assembly (or Con-Ass) to propose amendments to the Constitution. It is not clear, however, if Congress is to vote as a single



body or separately. How the Congress convenes as a Con-Ass is also not provided for in the Constitution.

Another method is through the Constitutional Convention (or Con-Con), where Congress, upon a vote of two-thirds of all its members, calls for a constitutional convention. They may also submit to the electorate the question of calling a convention through a majority vote of all its members. In a Con-Con, delegates will propose amendments or revisions to the constitution, not Congress. The 1987 Constitution does not provide for a method by which delegates to the Con-Con are chosen.

The third method is called the "People's Initiative" (or PI). In this method, amendments to the Constitution may be proposed by the people upon a petition of at least 12% of the total number of registered voters. All legislative districts must be represented by at least 12% of the registered votes therein. No amendment is allowed more than once every five years since a successful PI. The 1987 Constitution directs the Congress to enact a law to implement provisions of the PI, which has not yet materialized.

Amendments or revision to the constitution shall be valid only when ratified by a majority of the votes cast in a national referendum.

Only the House of Representatives can initiate the impeachment of the president, members of the Supreme Court, and other constitutionally protected public officials such as the Ombudsman. The Senate will then try the impeachment case. This is another safeguard to promote moral and ethical conduct in the government.

### ***Attempts to Amend or Change the 1987 Constitution***

The 1987 Constitution provided for three methods by which the Constitution can be amended, all requiring ratification by a majority vote in a national referendum. These methods were Constituent Assembly, Constitutional Convention, and People's Initiative. Using these modes, there were efforts to amend or change the 1987 Constitution, starting with the presidency of Fidel V. Ramos who succeeded Corazon Aquino. The first attempt was in 1995, when then Secretary of National Security Council Jose Almonte drafted a constitution, but it was exposed to the media and it never prospered. The second effort happened in 1997, when a group called PIRMA hoped to gather signatures from voters to change the constitution through a people's initiative. Many were against this, including then Senator



Miriam Defensor-Santiago, who brought the issue to court and won—with the Supreme Court judging that a people's initiative cannot push through without an enabling law.

The succeeding president, Joseph Ejercito Estrada, formed a study commission to investigate the issues surrounding charter change focusing on the economic and judiciary provisions of the constitution. This effort was also blocked by different entities. After President Estrada was replaced by another People Power and succeeded by his Vice President, Gloria Macapagal Arroyo, then House Speaker Jose de Venecia endorsed constitutional change through a Constituent Assembly, which entails a two-thirds vote of the House to propose amendments or revision to the Constitution. This initiative was also not successful since the term of President Arroyo was mired in controversy and scandal, including the possibility of Arroyo extending her term as president, which the Constitution does not allow.

The administration of the succeeding President Benigno Aquino III had no marked interest in charter change, except those emanating from different members of Congress, including the Speaker of the House, Feliciano Belmonte Jr., who attempted to introduce amendments to the Constitution that concern economic provisions that aim toward liberalization. This effort did not see the light of day.

**Federalism** in the Philippines was supported by President Duterte in the 2016 presidential elections, saying that it will evenly distribute wealth in the Philippines instead of concentrating it in Manila, the capital of the country. As a form of government, a central governing authority and constituent political units constitutionally share sovereignty. Applied to the Philippines, the country will be broken into autonomous regions. Each region will be further divided into local government units. The regions will have the primary responsibility of industry development, public safety and instruction, education, healthcare, transportation, and many more. Each region will also take charge of their own finances, plans for development, and laws exclusive to their area. The national government, on the other hand, will only handle matters of national interest such as foreign policy and defense, among others. In this system, it is possible for the central government and the regions to share certain powers.

Our current system is that of a unitary form, where administrative powers and resources are concentrated in the national government. Mayors and governors would have to rely on allocations provided to them



through a proposed budget that is also approved by the national government, a system prone to abuse.

There are many pros to a federal form of government. Each region may custom fit solutions to problems brought about by their distinct geographic, cultural, social, and economic contexts. Regions also have more power over their finances, since they handle majority of their income and only contributes to a small portion to the national government. They can choose to directly fund their own development projects without asking for the national government's go signal. A federal system could also promote specialization, since the national government could focus on nationwide concerns while regional governments can take care of administrative issues.

A federal form of government could also solve a lot of decade-old problems of the country. It may be a solution to the conflict in Mindanao, since a separate Bangsamoro region could be established for Muslim Mindanao. It could address the inequality in wealth distribution and lessen the dependence to Metro Manila, since regions can proceed with what they have to do without needing to consider the situation in the capital.

There are also cons to federalism. While it creates competition among regions, it could also be a challenge to achieving unity in the country. There might be regions which are not ready to govern themselves, or have lesser resources, which could mire them deeper in poverty and make development uneven in the country. There could be issues regarding overlaps in jurisdiction, since ambiguities may arise where national ends and regional begins, or vice versa. As a proposed solution to the conflict in Mindanao, we must also remember that the Autonomous Region in Muslim Mindanao (ARMM) has already been created, and the conflict still continues. Federalism may not be enough for those who clamor separation.

Any effort to shift the system of government also entails costs, and it would not be cheap. It would cost billions to dismantle the current system and would take a long time before the system normalizes and irons out its kinks.

In an upsurge of populism, President Rodrigo Duterte won the 2016 presidential elections in a campaign centering on law and order, proposing to reduce crime by killing tens of thousands of criminals. He is also a known advocate of federalism, a compound mode of government combining a central



or federal government with regional governments in a single political system. This advocacy is in part an influence of his background, being a local leader in Mindanao that has been mired in poverty and violence for decades. On 7 December 2016, President Duterte signed an executive order creating a consultative committee to review the 1987 Constitution.

## **Policies on Agrarian Reform**

Agrarian reform is essentially the rectification of the whole system of agriculture, an important aspect of the Philippine economy because nearly half of the population is employed in the agricultural sector, and most citizens live in rural areas. Agrarian reform is centered on the relationship between production and the distribution of land among farmers. It is also focused on the political and economic class character of the relations of production and distribution in farming and related enterprises, and how these connect to the wider class structure. Through genuine and comprehensive agrarian reform, the Philippines would be able to gain more from its agricultural potential and uplift the Filipinos in the agricultural sector, who have been, for the longest time, suffering in poverty and discontent.

In our attempt to understand the development of agrarian reform in the Philippines, we turn our attention to our country's history, especially our colonial past, where we could find the root of the agrarian woes the country has experienced up to this very day.

## ***Landownership in the Philippines under Spain***

When the Spaniards colonized the country, they brought with them a system of *pueblo* agriculture, where rural communities, often dispersed and scattered in nature, were organized into a *pueblo* and given land to cultivate.

Families were not allowed to own their land—the King of Spain owned the land, and Filipinos were assigned to these lands to cultivate them, and they paid their colonial tributes to the Spanish authorities in the form of agricultural products.

Later on, through the Law of the Indies, the Spanish crown awarded tracts of land to (1) religious orders; (2) *repartamientos* for Spanish military as reward for their service; and (3) Spanish *encomenderos*, those mandated to manage the *encomienda* or the lands given to them, where Filipinos worked and paid their tributes to the *encomendero*. Filipinos were not given the right to own land, and only worked in them so that they might have a share







policies to increase the small landholders and distribute ownership to a bigger number of Filipino tenants and farmers. The Philippine Bill of 1902 provided regulations on the disposal of public lands. A private individual may own 16 hectares of land while corporate landholders may have 1,024 hectares. Americans were also given rights to own agricultural lands in the country. The Philippine Commission also enacted Act No. 496 or the Land Registration Act, which introduced the Torrens system to address the absence of earlier records of issued land titles and conduct accurate land surveys. In 1903, the homestead program was introduced, allowing a tenant to enter into an agricultural business by acquiring a farm of at least 16 hectares. This program, however, was limited to areas in Northern Luzon and Mindanao, where colonial penetration had been difficult for Americans, a problem they inherited from the Spaniards.

Landownership did not improve during the American period; in fact, it even worsened, because there was no limit to the size of landholdings people could possess and the accessibility of possession was limited to those who could afford to buy, register, and acquire fixed property titles. Not all friar lands acquired by the Americans were given to landless peasant farmers. Some lands were sold or leased to American and Filipino business interest. This early land reform program was also implemented without support mechanisms—if a landless peasant farmer received land, he only received land, nothing more. Many were forced to return to tenancy and wealthy Filipino *hacendados* purchased or forcefully took over lands from farmers who could not afford to pay their debts. The system introduced by the Americans enabled more lands to be placed under tenancy, which led to widespread peasant uprisings, such as the Colorum and Sakdal Uprising in Luzon. Peasants and workers found refuge from millenarian movements that gave them hope that change could still happen through militancy.

The Sakdal (or Sakdalista) Uprising was a peasant rebellion in Central Luzon that lasted for two days, May 2–3, 1935. It was easily crushed by government forces then, but this historical event tells of the social inequality brought about by issues in land ownership and tenancy in the country.

The Filipino word *sakdal* means “to accuse,” which is the title of the newspaper helmed by Benigno Ramos. He rallied support from Manila





the National Resettlement and Rehabilitation Administration (NARRA) under the administration of President Ramon Magsaysay.

Magsaysay saw the importance of pursuing genuine land reform program and convinced the Congress, majority of which were landed elites, to pass legislation to improve the land reform situation. Republic Act No. 1199 or the Agricultural Tenancy Act was passed to govern the relationship between landholders and tenant farmers, protecting the tenurial rights of tenants and enforced tenancy practices. Through this law, the Court of Agricultural Relations was created in 1955 to improve tenancy security, fix land rentals of tenanted farms, and resolve land disputes filed by the landowners and peasant organizations. The Agricultural Tenancy Commission was also established to administer problems created by tenancy. The Agricultural Credit and Cooperative Financing Administration (ACCFA) was also created mainly to provide warehouse facilities and assist farmers in marketing their products. The administration spearheaded the establishment of the Agricultural and Industrial Bank to provide easier terms in applying for homestead and other farmlands.

NARRA accelerated the government's resettlement program and distribution of agricultural lands to landless tenants and farmers. It also aimed to convince members of the Huks, a movement of rebels in Central Luzon, to resettle in areas where they could restart their lives as peaceful citizens.

Despite a more vigorous effort toward agrarian reform, the situation for the farmers remained dire since the government lacked funds and provided inadequate support services for the programs. The landed elite did not fully cooperate and they criticized the programs.

A major stride in land reform arrived during the term of President Diosdado Macapagal through the Agricultural Land Reform Code (Republic Act No. 3844).

### **Primary Source: Declaration of Policy under RA No. 3844 or Agricultural Land Reform Code**

Source: Section 2. Declaration of Policy—It is the policy of the State:

- (1) To establish owner-cultivatorship and the economic family-size farm as the basis of Philippine agriculture and, as a consequence, divert landlord capital in agriculture to industrial development;
- (2) To achieve a dignified existence for the small farmers free from pernicious institutional restraints and practices;



- (3) To create a truly viable social and economic structure in agriculture conducive to greater productivity and higher farm incomes;
- (4) To apply all labor laws equally and without discrimination to both industrial and agricultural wage earners;
- (5) To provide a more vigorous and systematic land resettlement program and public land distribution; and
- (6) To make the small farmers more independent, self-reliant and responsible citizens, and a source of genuine strength in our democratic society.

This Code abolished share tenancy in the Philippines and prescribed a program to convert tenant-farmers to lessees and later on owner-cultivators. It also aimed to free tenants from tenancy and emphasize owner-cultivatorship and farmer independence, equity, productivity improvement, and public land distribution. Despite being one of the most comprehensive pieces of land reform legislation ever passed in the Philippines, Congress did not make any effort to come up with a separate bill to fund its implementation, despite the fact that it proved beneficial in the provinces where it was pilot tested.

### ***Agrarian Reform Efforts under Marcos***

President Marcos declared Martial Law in 1972, enabling him to essentially wipe out the landlord-dominated Congress. Through his "technocrats," he was able to expand executive power to start a "fundamental restructuring" of government, including its efforts in solving the deep structural problems of the countryside. Presidential Decree No. 27 or the Code of Agrarian Reform of the Philippines became the core of agrarian reform during Marcos regime.

#### **Primary Source: Presidential Decree No. 27, 21 October 1972**

This shall apply to tenant farmers of private agricultural lands primarily devoted to rice and corn under a system of sharecrop or lease-tenancy, whether classified as landed estate or not;

The tenant farmer, whether in land classified as landed estate or not, shall be deemed owner of a portion constituting a family-size farm of five (5) hectares if not irrigated and three (3) hectares if irrigated;

In all cases, the landowner may retain an area of not more than seven (7) hectares if such landowner is cultivating such area or will now cultivate it;



For the purpose of determining the cost of the land to be transferred to the tenant-farmer pursuant to this Decree, the value of the land shall be equivalent to two and one-half (2 1/2) times the average harvest of three normal crop years immediately preceding the promulgation of this Decree;

The total cost of the land, including interest at the rate of six (6) per centum per annum, shall be paid by the tenant in fifteen (15) years of fifteen (15) equal annual amortizations;

In case of default, the amortization due shall be paid by the farmers' cooperative in which the defaulting tenant-farmer is a member, with the cooperative having a right of recourse against him;

The government shall guaranty such amortizations with shares of stock in government-owned and government-controlled corporations;

No title to the land owned by the tenant-farmers under this Decree shall be actually issued to a tenant-farmer unless and until the tenant-farmer has become a full-fledged member of a duly recognized farmer's cooperative;

Title to land acquired pursuant to this Decree or the Land Reform Program of the Government shall not be transferable except by hereditary succession or to the Government in accordance with the provisions of this Decree, the Code of Agrarian Reforms and other existing laws and regulations;

The Department of Agrarian Reform through its Secretary is hereby empowered to promulgate rules and regulations for the implementation of this Decree.

"Operation Land Transfer" on lands occupied by tenants of more than seven hectares on rice and corn lands commenced, and through legal compulsion and an improved delivery of support services to small farmers, agrarian reform seemed to be finally achievable. Under the rice self-sufficiency program "Masagana '99," farmers were able to borrow from banks and purchase three-hectare plots of lands and agricultural inputs. However, the landlord class still found ways to circumvent the law. Because only rice lands were the focus of agrarian reform, some landlords only needed to change crops to be exempted from the program, such as coconut and sugar lands. Lands worked by wage labor were also exempt from the program, so the landed elite only had to evict their tenants and hired workers instead. Landlessness increased, which made it all the more difficult for the program to succeed because landless peasants were excluded from the program. Many other methods were employed by the elite to find a way to maintain their



power and dominance, which were worsened by the corruption of Marcos and his cronies who were also involved in the agricultural sector.

### ***Post-1986 Agrarian Reform***

The overthrow of Marcos and the 1987 Constitution resulted in a renewed interest and attention to agrarian reform as President Corazon Aquino envisioned agrarian reform to be the centerpiece of her administration's social legislation, which proved difficult because her background betrayed her—she came from a family of a wealthy and landed clan that owned the Hacienda Luisita.

On 22 July 1987, Aquino issued Presidential Proclamation 131 and Executive Order 229, which outlined her land reform program. In 1988, the Congress passed Republic Act No. 6657 or the Comprehensive Agrarian Reform Law (CARL), which introduced the program with the same name (Comprehensive Agrarian Reform Program or CARP). It enabled the redistribution of agricultural lands to tenant-farmers from landowners, who were paid in exchange by the government through just compensation and allowed them to retain not more than five hectares. Corporate landowners were, however, allowed under law to voluntarily divest a proportion of their capital stock, equity, or participation in favor of their workers or other qualified beneficiaries instead of turning over their land to the government.

CARP was limited because it accomplished very little during the administration of Aquino. It only accomplished 22.5% of land distribution in six years owing to the fact that Congress, dominated by the landed elite, was unwilling to fund the high compensation costs of the program. It was also mired in controversy, since Aquino seemingly bowed down to the pressure of her relatives by allowing the stock redistribution option. Hacienda Luisita reorganized itself into a corporation and distributed stocks to farmers.

Under the term of President Ramos, CARP implementation was speeded in order to meet the ten-year time frame, despite limitations and constraints in funding, logistics, and participation of involved sectors. By 1996, the Department of Agrarian Reform (DAR) distributed only 58.25% of the total area target to be covered by the program. To address the lacking funding and the dwindling time for the implementation of CARP, Ramos signed Republic Act No. 8532 in 1998 to amend CARL and extend the program to another ten years.



## ***CARPER and the Future of Agrarian Reform in the Philippines***

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The new deadline of CARP expired in 2008, leaving 1.2 million farmer beneficiaries and 1.6 million hectares of agricultural land to be distributed to farmers. In 2009, President Arroyo signed Republic Act No. 9700 or the Comprehensive Agrarian Reform Program Extension with Reforms (CARPER), the amendatory law that extended the deadline to five more years. Section 30 of the law also mandates that any case and/or proceeding involving the implementation of the provisions of CARP, as amended, which may remain pending on 30 June 2014 shall be allowed to proceed to its finality and executed even beyond such date.

From 2009 to 2014, CARPER has distributed a total of 1 million hectares of land to 900,000 farmer beneficiaries. After 27 years of land reform and two Aquino administrations, 500,000 hectares of lands remain undistributed. The DAR and the Department of Environment and Natural Resources (DENR) are the government agencies mandated to fulfill CARP and CARPER, but even the combined effort and resources of the two agencies have proved incapable of fully achieving the goal of agrarian reform in the Philippines. The same problems have plagued its implementation: the powerful landed elite and the ineffectual bureaucracy of the Philippine government. Until these two challenges are surmounted, genuine agrarian reform in the Philippines remains but a dream to Filipino farmers who have been fighting for their right to landownership for centuries.

## ***Evolution of Philippine Taxation***

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In today's world, taxation is a reality that all citizens must contend with for the primary reason that governments raise revenue from the people they govern to be able to function fully. In exchange for the taxes that people pay, the government promises to improve the citizens' lives through good governance. Taxation, as a government mechanism to raise funds, developed and evolved through time, and in the context of the Philippines, we must understand that it came with our colonial experience.

## ***Taxation in Spanish Philippines***

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The Philippines may have abundant natural resources even before the encroachment of the Spaniards, but our ancestors were mainly involved in a subsistence economy, and while the payment of tribute or taxes (*buhis/buwis/handug*) or the obligation to provide labor services to the *datus* in some early Filipino communities in the Philippines may resemble taxation, it is essentially different from the contemporary meaning of the concept.



The arrival of the Spaniards altered this subsistence system because they imposed the payment of *tributos* (tributes) from the Filipinos, similar to what had been practiced in all colonies in America. The purpose is to generate resources to finance the maintenance of the islands, such as salaries of government officials and expenses of the clergy. The difficulty faced by the Spaniards in revenue collection through the tribute was the dispersed nature of the settlements, which they solved by introducing the system of *reduccion* by creating *pueblos*, where Filipinos were gathered and awarded plots of land to till. Later on, the settlements will be handled by *encomenderos* who received rewards from the Spanish crown for their services. Exempted from payment of tributos were the *principales*: *alcaldes*, *gobernadores*, *cabezas de barangay*, soldiers, members of the civil guard, government officials, and vagrants.

The Filipinos who were once satisfied with agricultural production for subsistence had to increase production to meet the demands of payments and a more intensive agricultural system had to be introduced. Later on, half of the tribute was paid in cash and the rest with produce. This financed the conquest of the Philippines.

Toward the end of the sixteenth century, the Manila-Acapulco trade was established through the galleons, a way by which the Spaniards could make sure that European presence would be sustained. Once a year, the galleon would be loaded up with merchandise from Asia and sent to New Spain (Mexico), and back. This improved the economy of the Philippines and reinforced the control of the Spaniards all over the country. Tax collection was still very poor and subsidy from the Spain would be needed through the *situado real* delivered from the Mexican treasury to the Philippines through the galleons. This subsidy stopped as Mexico became independent in 1820.

In 1884, the payment of tribute was put to a stop and was replaced by a poll tax collected through a certificate of identification called the *cédula personal*. This is required from every resident and must be carried while traveling. Unlike the tribute, the payment of *cédulas* is by person, not by family. Payment of the *cédula* is progressive and according to income categories. This system, however, was a heavy burden for the peasants and was easy for the wealthy. But because of this, revenue collection greatly increased and became the main source of government income. The Chinese in the Philippines were also made to pay their discriminatory *cédula* which was bigger than what the Filipinos paid.



Two direct taxes were added in 1878 and imposed on urban incomes. *Urbana* is a tax on the annual rental value of an urban real estate and *industria* is a tax on salaries, dividends, and profits. These taxes were universal and affected all kinds of economic activity except agriculture, which was exempt to encourage growth.

Indirect taxes such as customs duties were imposed on exports and imports to further raise revenue, especially during the nineteenth century when economic growth increased exponentially. There were no excise taxes collected by the Spaniards throughout the years of colonialism.

The colonial government also gained income from monopolies, such as the sale of stamped paper, manufacture and sale of liquor, cockpits, and opium, but the biggest of the state monopolies was tobacco, which began in 1781 and halted in 1882. Only certain areas were assigned to cultivate tobacco, which the government purchased at a price dictated to the growers. This monopoly made it possible for the colony to create a surplus of income that made it self-sufficient without the need for the *situado real* and even contributed to the Treasury of Spain.

Forced labor was a character of Spanish colonial taxation in the Philippines and was required from the Filipinos. It proved useful in defending the territory of the colony and augmenting the labor required by woodcutting and shipbuilding especially during the time of the galleon trade. Through the *polo* system, male Filipinos were obliged to serve, a burden that resulted in an increase in death rate and flight to the mountains, which led to a decrease in population in the seventeenth century. This changed later on, as *polos* and *servicios* became lighter, and was organized at the municipal level. Labor provided was used in public works, such as the building of roads and bridges. Some were made to serve the municipal office or as night guards.

Males were required to provide labor for 40 days a year (reduced to 15 days a year in 1884). They may opt out by paying the *fallas* of three pesos per annum, which was usually lost to corruption because it was collected at the municipal level and were known as *caidas* or droppings. The *polos* would be called *prestación personal* (personal services) by the second half of the nineteenth century.

Taxation in the Philippines during the Spanish colonial period was characterized by the heavy burden placed on the Filipinos, and the corruption of the *principales*, or the former datus and local elites who were co-opted by the Spaniards to subjugate and control the natives on their behalf. The *principales* who were given positions such as *cabezas de barangay* or *alcaldes*



in the local government were able to enrich themselves by pocketing *tributos* and/or *fallas*, while the peasants were left to be abused. Taxation appeared progressive but the disparity between the less taxed *principales* and the heavily taxed peasants made the rich richer and the poor poorer.

### Primary Source: Mariano Herbosa Writes to Rizal About Taxes

Source: Mariano Herbosa to Jose Rizal, Calamba, 29 August 1886, *Letters Between Rizal and Family Members* (Manila: National Heroes Commission, 1964), 239–241.

The tax! With regard to your question on this, the answer is very long, as it is the cause of the prevailing misery here. What I can write you will be only one-half of the story and even Dumas, senior, cannot exhaust the subject. Nevertheless, I'll try to write what I can, though I may not be able to give a complete story, you may at least know half of it.

Here, there are many kinds of taxes. What they call irrigated rice land, even if it has no water, must pay a tax of 50 *cavanes* of *palay* (unhusked rice) and land with six *cavanes* of seed pay 5 pesos in cash. The land they call dry land that is planted to sugar cane, maize, and others pay different rates. Even if the agreed amount is 30 pesos for land with six *cavanes* of seed, if they see that the harvest is good, they increase the tax, but they don't decrease it, if the harvest is poor. There is land whose tax is 25 pesos or 20 pesos, according to custom.

The most troublesome are the residential lots in the town. There is no fixed rule that is followed, only their whim. Hence, even if it is only one span in size, if a stone wall is added, 50 pesos must be paid, the lowest being 20 pesos. But a *nipa* or cogon house pays only one peso for an area of ten fathoms square. Another feature of this system is that on the day you accept the conditions, the contract will be written which cannot be changed for four years, but the tax is increased every year. For these reasons, for two years now the payment of tax is confused and little by little the fear of the residents here of the word "vacant" is being dispelled, which our ancestors had feared so much. The result is bargaining, like they do in buying fish. It is advisable to offer a low figure and payment can be postponed, unlike before when people were very much afraid to pay after May.

I'm looking for a receipt to send you, but I cannot find any, because we don't get a receipt every time we pay. Anyway it is value-less as it does not state the amount paid; it only says that the tax for that year was



paid, without stating whether it is five centavos, twenty-five centavos, one hundred, or one thousand pesos. The residents who ask or get the said receipt accept it with closed eyes. The receipt has no signature in the place where the amount paid ought to be, although it bears their name. Until now I cannot comprehend why some are signed and others are not. This is more or less what is happening here in the payment of the land tax and it has been so for many years since I can remember.

Besides this, the taxes on the plants in the fields that are far from the town, like the land in Pansol, are various. The tax on the *palay* is separate from the tax on maize, *mongo*, or garlic. There is no limit to this tax, for they fix it themselves. Since July no one buys sugar and since June locusts are all over the town and they are destroying *palay* and sugar cane, which is what we regret here. The governor gave 50 pesos to pay the catchers of locusts, but when they took them to the town hall they were paid only 25 cents a cavan and a half; and it seems that the locusts are not decreasing. According to the guess of the residents here only 300 *cavanes* of locusts have been caught in this town. Many still remain. Though the governor has not sent any more money, the people have not stopped catching them.

### Taxation under the Americans

The Americans who acquired the Philippines aimed to make the economy self-sufficient by running the government with the smallest possible sum of revenue and create surplus in the budget. From 1898 to 1903, the Americans followed the Spanish system of taxation with some modifications, noting that the system introduced by the Spaniards were outdated and regressive. The military government suspended the contracts for the sale of opium, lottery, and mint charges for coinage of money. Later on, the *urbana* would be replaced by tax on real estate, which became known as the land tax. The land tax was levied on both urban and rural real estates.

The problem with land tax was that land titling in the rural area was very disorderly: the appraising of land value was influenced by political and familial factors and the introduction of a taxation system on agricultural land faced objections from the landed elite. Tax evasion was prevalent, especially among the elites.

The Internal Revenue Law of 1904 was passed as a reaction to the problems of collecting land tax. It prescribed ten major sources of revenue: (1) licensed taxes on firms dealing in alcoholic beverages and tobacco,



(2) excise taxes on alcoholic beverages and tobacco products, (3) taxes on banks and bankers, (4) document stamp taxes, (5) the *cédula*, (6) taxes on insurance and insurance companies, (7) taxes on forest products, (8) mining concessions, (9) taxes on business and manufacturing, and (10) occupational licenses.

The *cédula* went through changes in the new law as the rate was fixed per adult male, which resulted in a great decline in revenues. In 1907, some provinces were authorized to double the fee for the *cédula* to support the construction and maintenance of roads. The *industria* tax was levied on the business community and became a highly complex system that assigned a certain tax to an industrial or commercial activity according to their profitability. The new act also imposed a percentage tax on sales payable quarterly.

In 1913, the Underwood-Simmons Tariff Act was passed, resulting in a reduction in the revenue of the government as export taxes levied on sugar, tobacco, hemp, and copra were lifted. To make up for the loss, then Governor General Francis Burton Harrison urged that tax receipts be increased to make up for the loss. Minor changes were made to the 1904 Internal Revenue Act such as the imposition of taxes on mines, petroleum products, and dealers of petroleum products and tobacco.

New sources of taxes were introduced later on. In 1914, an income tax was introduced; in 1919, an inheritance tax was created; and in 1932, a national lottery was established to create more revenue for the government. However, these new creations were not enough to increase government revenues.

### Taxation during the Commonwealth Period

New measures and legislation were introduced to make the taxation system appear more equitable during the Commonwealth. Income tax rates were increased in 1936, adding a surtax rate on individual net incomes in excess of 10,000 pesos. Income tax rates of corporations were also increased. In 1937, the *cédula* tax was abolished, which appeared to be a progressive move; but in 1940, a residence tax was imposed on every citizen aged 18 years old and on every corporation.

In 1939, the Commonwealth government drafted the National Internal Revenue Code, introducing major changes in the new tax system, as follows:

1. The normal tax of three percent and the surtax on income was replaced by a single tax at a progressive rate.



2. Personal exemptions were reduced.
3. Corporation income tax was slightly increased by introducing taxes on inherited estates or gifts donated in the name of dead persons.
4. The cumulative sales tax was replaced by a single turnover tax of 10% on luxuries.
5. Taxes on liquors, cigarettes, forestry products, and mining were increased.
6. Dividends were made taxable.

The introduced tax structure was an improvement of the earlier system introduced by the Americans, but still remained inequitable. The lower class still felt the bulk of the burden of taxation, while the upper class, the landed elite or the people in political positions, were able to maneuver the situation that would benefit them more. The agriculture sector was still taxed low to promote growth, but there was no incentive for industrial investment to take root and develop.

Finally, a common character of taxation during the American occupation in the Philippines was not used to diversify the economy or direct economic development as some sectors still carried the disproportionate share of the tax burden.

As World War II reached the Philippine shores, economic activity was put to a stop and the Philippines bowed to a new set of administrators, the Japanese. The Japanese military administration in the Philippines during World War II immediately continued the system of tax collection introduced during the Commonwealth, but exempted the articles belonging to the Japanese armed forces. Foreign trade fell and the main sources of taxation came from amusements, manufactures, professions, and business licenses. As the war raged, tax collection was a difficult task and additional incomes of the government were derived from the sales of the National Sweepstakes and sale of government bonds.

The expenditure of the Japanese military government grew greatly, and they issued military notes in order to cover the costs of the war.

### ***Fiscal Policy from 1946 to Present***

The impact of the war on the Philippine economy was effectively disparate, as Manila, the capital, was razed to the ground while the rest of the Philippines was relatively untouched. But the highly agriculture-



based economy was disrupted. The United States may have declared the Philippines independent, but as the country needed rehabilitation funds from the United States, the dependency of the Philippines to the Americans was an opportunity to be taken advantage of by the former colonial administrators. The economic situation was so problematic that by 1949, there was a severe lack of funds in many aspects of governance, such as the military and education sectors. No efforts were made to improve tax collection and the United States advised the adoption of direct taxation. The administration of President Manuel Roxas declined the proposal because it did not want to alienate its allies in Congress.

The impetus for economic growth came during the time of President Elpidio Quirino through the implementation of import and exchange controls that led to import substitution development. This policy allowed for the expansion of a viable manufacturing sector that reduced economic dependence on imports. New tax measures were also passed, which included higher corporate tax rates that increased government revenues—tax revenue in 1953 increased twofold compared to 1948, the year when Quirino first assumed presidency.

While the succeeding presidencies of Magsaysay, Garcia, and Macapagal promised to study the tax structure and policy of the country (through the creation of a Tax Commission in 1959 by means of Republic Act No. 2211) to make way for a more robust and efficient tax collection scheme, post-war fiscal policy remained regressive, characterized by the overburdening of the lowest classes while the landed elite who held business interests were in Congress to ensure that taxes would not be levied to them who belonged to the higher classes of society. The period of the post-war republic also saw a rise in corruption. From 1959 to 1968, Congress did not pass any tax legislation despite important changes in the economy and the vested interests of Filipino businessmen in Congress would manifest in many instances such as the rejection of taxes on imports. Indirect taxation still contributed to three quarters of tax revenues and the Omnibus Tax Law of 1969 did not increase the ratio of income tax to general tax revenue. Collection of taxes remained poor; tax structure was still problematic; and much of public funds were lost to corruption, which left the government incapable of funding projects geared toward development.

Under the Marcos authoritarian regime, the tax system remained regressive. During the latter part of the Marcos's years (1981–1985), the tax system was still heavily dependent on indirect taxes, which made up 70% of total tax collection. The tax system also remained unresponsive. Taxes grew



at an average annual rate of 15% and generated a low tax yield. Tax effort, defined as the ratio between the share of the actual tax collection in gross domestic product and predictable taxable capacity, was at a low 10.7%.

As Corazon Aquino took the helm of the government after the EDSA Revolution, she reformed the tax system through the 1986 Tax Reform Program. The aim was to improve the responsiveness of the tax system, promote equity by ensuring that similarly situated individuals and firms bear the same tax burden, promote growth by withdrawing or modifying taxes that reduce incentives to work or produce, and improve tax administration by simplifying the tax system and promoting tax compliance.

A major reform in the tax system introduced under the term of Aquino was the introduction of the value-added tax (VAT), with the following features:

1. uniform rate of 10% on sale of domestic and imported goods and services and zero percent on exports and foreign-currency denominated sales;
2. ten (10) percent in lieu of varied rates applicable to fixed taxes (60 nominal rates), advance sales tax, tax on original sale, subsequent sales tax, compensating tax, miller's tax, contractor's tax, broker's tax, film lessors and distributor's tax, excise tax on solvents and matches, and excise tax on processed videotapes;
3. two percent tax on entities with annual sales or receipts of less than 5,200,000;
4. adoption of tax credit method of calculating tax by subtracting tax on inputs from tax on gross sales;
5. exemption of the sale of basic commodities such as agriculture and marine food products in their original state, price-regulated petroleum products and fertilizers; and
6. additional 20% tax on non-essential articles such jewelry, perfumes, toilet waters, yacht, and other vessels for pleasure and sports.

The VAT law was signed in 1986 and put to effect in 1988. While it was a reliable source of revenue for the government, new tax laws would reduce its reliability as legislated exemptions grew.

Along with tax reform came the administrative reforms, such as the restructuring of the Department of Finance and its attached agency, the Bureau of Internal Revenue (BIR) through the Executive Order 127. Tax



collection and tax audits were intensified; computerization was introduced; and corruption was relatively reduced, which improved the trust in the BIR in general. As a result of the tax reform of the Aquino administration, both tax and revenue effort rose, increasing from 10.7% in 1985 to 15.4% in 1992.

Greater political stability during the administration of Fidel Ramos in 1992 allowed for continued economic growth. The Ramos administration ventured into its own tax reform program in 1997 through the Comprehensive Tax Reform Program, which was implemented to (1) make the tax system broad-based, simple, and with reasonable tax rates; (2) minimize tax avoidance allowed by existing flaws and loopholes in the system; (3) encourage payments by increasing tax exemptions levels, lowering the highest tax rates, and simplifying procedure; and (4) rationalize the grant of tax incentives, which was estimated to be worth 531.7 billion pesos in 1994.

The VAT base was also broadened in 1997 to include services, through Republic Act 7716. The features of the improved VAT law were as follows:

1. Restored the VAT exemptions for all cooperatives (agricultural, electric, credit or multipurpose, and others) provided that the share capital of each member does not exceed 515,000 pesos.
2. Expanded the coverage of the term "simple processes" by including broiling and roasting, effectively narrowing the tax base for food products.
3. Expanded the coverage of the term "original state" by including molasses.
4. Exempted from the VAT are the following:
  - Importation of meat
  - Sale or importation of coal and natural gas in whatever form or state
  - Educational services rendered by private educational institutions duly accredited by the Commission on Higher Education (CHED)
  - House and lot and other residential dwellings valued at 51 million and below, subject to adjustment using the Consumer Price Index (CPI)
  - Lease of residential units with monthly rental per unit of not more than 58,000, subject to adjustment using CPI



- Sale, importation, printing, or publication of books and any newspaper

The succeeding term of President Joseph Estrada in 1998 was too short to constitute any change in the tax system. Then Vice President Gloria Macapagal-Arroyo was swept to power through another EDSA Revolution. As president, she undertook increased government spending without adjusting tax collections. This resulted in large deficits from 2002 to 2004. The government had to look for additional sources of revenue, and in 2005, the Expanded Value-Added Tax (E-VAT) was signed into law as Republic Act 9337. This expanded the VAT base, subjecting to VAT energy products such as coal and petroleum products and electricity generation, transmission, and distribution. Select professional services were also taxed. In February 2006, the VAT tax rate was also increased from 10% to 12%.

As President Benigno Aquino III succeeded President Arroyo in 2010, he promised that no new taxes would be imposed and additional revenue would have to come from adjusting existing taxes. The administration ventured into the adjustment of excise tax on liquor and cigarettes or the Sin Tax Reform, motivations for which was primarily fiscal, public health, and social order-related considerations. Republic Act 10351 was passed, and government revenues from alcohol and tobacco excise taxes increased. Collections from tobacco and alcohol in 2015 made up 1.1% of the Gross Domestic Product and the improvement in tax collection resulted in the Philippines receiving a credit rating upgrade into investment grade status. The Sin Tax Reform was an exemplar on how tax reform could impact social services as it allowed for the increase of the Department of Health budget (triple in 2015) and free health insurance premiums for the poor people enrolled in PhilHealth increased (from 55.2 million in 2012 to 515.4 million in 2015).

The administration of the new President Rodrigo Duterte promised tax reform, particularly in income taxes as it vowed to lower income tax rates shouldered by working Filipinos. The present income tax scheme of the country is the second highest in Southeast Asia and the current laws on income taxes were outdated as they were drafted two decades ago. The proposed tax reform also seeks to limit VAT exemptions and increase excise taxes on petroleum products and automobiles. It is hoped that reforms in the country's tax policy will result in the much-desired economic development that will be felt even by the lowest classes in society.



## Chapter Exercises

A. **True or False.** Write **true** if the statement is true. Otherwise, write **false** in the space provided.

- \_\_\_\_\_ 1. The 1935 Commonwealth Constitution was a result of the passage in the United States Congress of the Hare-Hawes-Cutting Act.
- \_\_\_\_\_ 2. The Philippine Commonwealth was interrupted by the Cold War.
- \_\_\_\_\_ 3. Before 1973, the constitution in effect in the Philippines was the 1935 Constitution.
- \_\_\_\_\_ 4. Landownership in the Philippines during the Spanish colonial period was a great source of hatred and resentment among the Filipinos.
- \_\_\_\_\_ 5. The American period ushered in a great improvement in landownership in the country.
- \_\_\_\_\_ 6. Agrarian reform under the dictator Ferdinand Marcos was a failure.
- \_\_\_\_\_ 7. The *cédula personal* was optional during the Spanish period.
- \_\_\_\_\_ 8. Direct taxation was suggested by the Americans after World War II, but then President Manuel Roxas declined it.
- \_\_\_\_\_ 9. The VAT or value-added tax was introduced during the time of President Elpidio Quirino.
- \_\_\_\_\_ 10. The Sin Tax Reform is a good example on how tax reform could impact social services.

B. **Historical Reporting.** Form groups with four to five members each. Research on a particular current event or issue in the country that spans at least three periods in Philippine history, tracing the roots of the issue and proposing solutions or recommendations afterward. Present the group's finding in class.



- C. **Infographic Exhibit.** Form groups with four to five members each. Each group will think of a specific social, political, economic, or cultural issue in the Philippines. Research on its evolution and propose recommendations and solutions. Hold an exhibit in the campus to showcase your research.

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# Chapter 5

## Doing History: A Guide for Students

### Learning Objectives:

- To manifest interest in local history and cultural heritage.
- To apply historiographical methods in writing the history of one's locality or country.
- To incorporate technology in the discipline of history.
- To appreciate the value of doing history to the present day.

It is not enough that we know our history. We must also realize that as agents of social change, we can contribute to the narrative of the nation by participating in writing about our past and our present. This chapter focuses on applying the skills we have learned in the previous chapters in writing history. Special attention will be given to doing online research, library/archival research, biographies/life history, and local/oral history. An additional discussion on interacting with history through historical shrines and museums will also help us in appreciating the story of the past as it comes to life through our own experiences in visiting and interacting with these learning spaces.



## Doing Historical Research Online

Let us start with the first tool that any student nowadays would use to do research—the Internet. It has increasingly become the primary means by which anyone would find any information that they need. With a single click, students are able to access tons and tons of available information. So much information, in fact, that it would be easy to get lost in all the data available.

Cyberspace is a great resource for research if you know how to use it properly. Remember that just because information is available does not mean you should just get it and use it right away—appropriating something, such as an idea, as yours is considered plagiarism, which is one of the worst crimes in the academe. Treat anything you find online as a source and use the same historical methods you have learned to analyze the data you get online.

A simple skill that will get you far in doing historical research online is knowing *where* to look and *how* to look. Search engine websites such as Yahoo! ([www.yahoo.com](http://www.yahoo.com)) or Google ([www.google.com](http://www.google.com)) could lead you to a lot of sources with the right search strings. A search string is a combination of words that you use to come up with relevant results and lead you to what you are looking for. The more refined your search string is, the more definite and refined the results will be.

Google also provides its own customized platform for scholarly research, called Google Scholar ([www.scholar.google.com](http://www.scholar.google.com)). You may use it to find electronic journal articles, materials from institutional repositories, and book chapters from many different sources. It could be a good starting point in building your research by providing you an overview of existing published material for your topic. Google Books ([www.books.google.com](http://www.books.google.com)) also provides sources for scanned books, where you may be able to read some chapters for free. This could be useful if you want to know if a certain book would be useful to your research before going to a physical library to loan the book or photocopy pages of it.

Sometimes, a simple search online is all you need to find the data you need. And most often, one of the first results that will come out will be pages from Wikipedia. Wikipedia is the biggest open source encyclopedia in the whole of cyberspace. In 2017, it has 40 million articles in 293 languages. Being an open source encyclopedia, anyone could contribute or edit articles in the site, which makes some of the information in the site unreliable. Nonetheless, Wikipedia provides a useful launch pad to sources that you



may use for research. When you read from Wikipedia, look at the linked citations in the articles, which could lead you to a source you may use for your own research. However, exercise caution in using this site, as many in the academe frown upon research that utilizes Wikipedia. As a practice, use Wikipedia to gain a general overview of what you need to know so that you may be guided in looking for credible and reliable sources that you need for your research.

There are websites that you may use to legally download scanned copies of books and other materials for free, especially those books with expired copyrights and are in public domain. Project Gutenberg ([www.gutenberg.org](http://www.gutenberg.org)) is the oldest digital library in the world, founded in 1971. It has more than 50,000 items in its collection, which include many works concerning the Philippines, such as the *Doctrina Cristiana* (the first published book in the Philippines), the published travelogues of foreigners who visited the Philippines such as Jagor, de Comyn, Virchow, Foreman, and Worcester; Austin Craig's biography of Rizal, and all volumes of Blair and Robertson's *The Philippine Islands: 1493-1898*. Another online archive you may use is Internet Archive ([www.archive.org](http://www.archive.org)), an online library that originally sought to archive web history, but grew later on to provide digital versions of other works. The archive contains 279 billion web pages, 11 million books and texts, four million audio recordings, three million videos, one million images, and 100,000 software programs.

Philippine government websites ([www.gov.ph](http://www.gov.ph)) are starting to be enriched with sources that may be used for historical research, especially on laws and other government issuances that may be useful when doing topics of a more contemporary period. Websites of newspapers, magazines, broadcasting stations, and other media outlets usually keep an archive of their articles from a particular date. For older issues, you may have to find copies, either digitized or physical copies, in the library.

## Doing Historical Research in Libraries and Archives

Research in libraries and archives is necessary in the study of history as these are repositories of primary and secondary sources that allow us to create narratives of the past through accepted methods of historical scholarship. It is imperative upon students to be able to develop an aptitude toward doing research in these venues so as to further develop their skills in historical research.



Students of history are usually expected to write historical essays and/or historical research papers, and this entails the collection of data through primary sources. There are available primary sources on Philippine history online, however, much remains to be digitized and made accessible to the public. Libraries and archives still provide more variety of sources in different formats such as books, journal articles, newspapers, magazines, photographs, and even audio and video recordings. But sifting through all the materials available might prove to be a daunting task for the unacquainted.

Nowadays, libraries have forgone the tedious and antiquated card cataloging system and have been using the digital version to catalog their holdings, called the Online Public Access Catalog (OPAC), sometimes simply the Library Catalog. In this system, instead of going through each entry on physical index cards, a simple search will yield the holdings of the library related to what you are searching for. Searching by subject will give you a list of sources, primary and secondary, to aid you in creating a preliminary biography that you may later on access physically in the holdings of the library.

A problem that could arise this way is when the search yields too many results—sifting through these may need a more refined search string using more definite keywords to limit the results. For example, “Philippine History” as a search string would result in hundreds, even thousands of materials. Limit it to particular keywords that focus on your topic, such as “Philippine Revolution,” “Emilio Aguinaldo,” “Declaration of Independence,” and other more defined strings.

The catalog lists down all kinds of materials available based on the subject used in the search. These could be books, journals, maps, and other materials that fit what you might be looking for. Do not limit yourself to using books and other published materials when you may be able to utilize other forms of sources. Materials that may be too old to be physically handled may also be available in digital form or microfilm.

The National Library of the Philippines in Ermita, Manila provides a rich treasure trove of materials for the student-researcher interested in Philippine history, especially in their Filipiniana section. It has a valuable Rizaliana collection, several sets of Blair and Robertson’s *The Philippine Islands, 1493–1898*, rare Filipiniana books, Philippine Presidential Papers, and other materials that are accessible to the public, especially to students.

Research in archives may be a lot more difficult and prove to be too advanced, but will provide you with many sources not available in the usual



libraries. The National Archives of the Philippines, also in Manila, is an agency of the government mandated to collect, store, preserve, and make available records of the government and other primary sources pertaining to the history and development of the Philippines. Most of the materials here, especially for the years of Spanish colonialism, are in their original language and may not be accessible to college students. But other materials may be useful, and it would not hurt to ask assistance from the staff in the archives.

The libraries in the University of the Philippines in Diliman, Quezon City have holdings that could also be useful in research. The collections particularly in the Main Library in Gonzales Hall are rich in resources especially the Filipiniana section, serials, theses, and dissertations.

Other university libraries are also accessible to the public. The Ateneo de Manila University in Quezon City holds the American Historical Collection, a rich source for the American period in the Philippines. The University of Santo Tomas in España, Manila also has collections from the sixteenth century, owing to the fact that it is the oldest Catholic university in the country and is a historic site in itself.

Private libraries and institutions also have archives that may be used for research. The Family History Center at the Church of Jesus Christ of Latter-Day Saints is a generous resource for research on genealogies. The Chinben See Memorial Library in Kaisa-Angelo King Heritage Center offers resources on Chinese and Filipino-Chinese in the Philippines and in Southeast Asia. The Archdiocesan Archives of Manila has immense Church data sources. Your city or town may have its own local archives, museum, or public library where you may access primary sources and other materials for your research.

## Doing Life Histories and Biographical Research

Studying history is always focused on history of nations and different collectives. Studying the life of an individual is often incidental to a greater event that has been significant to the life of a larger unit that he or she happened to contribute to. Life history is an oft-neglected subdiscipline of history because it is seen as trivial to larger narratives of nations, societies, and civilizations. However, students of history should realize that the individual is a significant contributor to various historical breakthroughs across periods of time. Individuals make up societies and individual actions can cause large-scale social change.



Individuals' influence can span centuries and generations. Individuals can also influence large spaces and many places. For example, Jesus Christ as an individual, influenced the whole world. The faith and the religion that He started also launched wars, created civilizations, lasted for many centuries, and persist up to the present. Jose Rizal, on the other hand, influenced many generations of Filipinos. His novels inspired radical Filipinos to fight the colonizers, and his death was seen as the tipping point of the revolution. However, his influence was limited to the Philippines.

These examples are cases of exceptional individuals. History has proven that their lives, their exploits, and their legacies had a huge impact in the society where they belonged. Nevertheless, the writing of life history should not be limited to great individuals like heroes, prophets, or world leaders. Ordinary individuals should also be able to locate themselves in the pages of history. One should see himself as a part of a larger history and not as a separate and remote entity unaffected by what is happening around him. Doing life histories should be accompanied by locating the life of the individual in the larger social life.

Indeed, people's interest in history can be perked up once they realize that their lives can be plotted alongside the trajectory of history of a larger nation, society, or even local community. There is after all, a mutual constitution between history and biography. However, doing a life history is not an easy task. The researcher should be able to identify different factors that affected the life of the person he is trying to study. Some social scientists would lament that studying individuals tend to be more complicated than studying societies. Individuals are distinct, unique, and dynamic. The life historian or the biographer should identify aspects of the individual's life in order to properly historicize his life.

For example, studying the life of Jose Rizal does not only require looking at big events in his life that affected the nascent nation, like the publication of his novels, his exile to Dapitan, or his execution in Bagumbayan. A more thorough understanding of Rizal's life necessitates looking at different aspects of his life that affected his persona. Examples are his family, his education, his peers, his travels, and even his affections. In relation to this, one should also look at the context where Rizal existed. It is worthwhile to ask, for example, about Rizal's hometown. What were the characteristics of Calamba, Laguna in the nineteenth century? What was the most common livelihood in that town? Was it a rich progressive municipality? What was the terrain like? Was it an agricultural locality? These questions will give context to Rizal's childhood and family.



Speaking of family, doing a life history of an individual will also lead to questions about his family and genealogy. Indeed, family is an important aspect of an individual. It determines the person's socioeconomic status, religious belief, character, interests, and values. In the same example, getting to know Rizal's family and genealogy would tell us about Rizal's socioeconomic status. Such will answer other questions about Rizal, like How did he afford to study in good schools in Manila even though he was an *indio*? What were his interests in the Calamba *hacienda* incident? Who instilled upon him the value of education? Who was his greatest influence? And so on.

Institutions where the individual belonged should also be looked at in studying his life history. If the family and the community where he belonged will give us clues about his early life, the latter stages of his life can be understood with certain activities and learning that he had as he affiliated in different institutions like schools, organizations, fraternity, church, and interest groups. In the case of Rizal, for example, one can learn a lot about the development of his ideas by knowing the kind of education taught at the Universidad de Santo Tomas and Ateneo Municipal. His political opinions and biases shaped his work with the Propagandistas in Europe and in his stint in La Solidaridad. Institutions, indeed, are not only shaped by individuals. Institutions also shape individuals.

Other aspects that may be studied in order to come up with a deeper life history are sector, ethnic group, and culture. Zooming out to the national history of the country where that individual identifies with is also helpful.

Understanding these seemingly mundane aspects of an individual's life would provide historians insightful information that will allow him, not just to simply state facts about the individual but also to make sense of these facts and establish connections about different aspects of the individual's life in order to understand the person that he has become.

## Doing Local and Oral History

The history subjects and courses usually taught to students in schools are Philippine history, world history, and history of Asia. The coverage is always expansive and taught in broad strokes of historical periods, of large spaces, and of prominent personalities. Little is known about the subdiscipline of local history. *Local history* is the study of the history of a particular community or a smaller unit of geography. Debates, however, continuously persist on the definition of this subdiscipline, particularly in



the subject of its study. Does local history study local communities? Local institutions? Local groups? Local heroes? In recent studies, local history tends to cover all of these topics. Local historians study the history of local institutions like churches. They also study the local economies, local heroes, and local events. Local history, thus, is also a broad and dynamic field of inquiry that aims to have an in-depth understanding of a certain locale.

The most compelling question, however, is why study and do local history? In the first chapter, we discussed how history could serve as a repository of collective memory. Such memory is important in forging of national unity through identification with a common collective past. Nevertheless, nationalism, like other ideologies, when taken into extreme can produce the most horrendous of human tragedies. The atrocities of the Second World War that killed six million Jewish people in Europe were perpetrated by an extreme nationalist rhetoric propagated by Nazi Germany. Totalitarian states at present, like the North Korea, also use nationalism in justifying the dictatorial and anti-democratic character of the country. In these cases of extreme nationalism, history is being used by states in forms of official national history to rally the people behind them.

Local history can serve as a balancer of these tendencies by showing the peculiarities in certain locales in a particular nation, region, or continent. Studying local history can provide new and alternative interpretations on the different aspects of a nation's history. Local history also facilitates a historical narrative emanating from the people. Historians call this the *history from below*. Ultimately, studying local history shall provide new provisions and perspectives on the already established national history. What used to be a generalizing narrative of the nation would start to recognize certain nuances and uniqueness in the experience of people coming from different localities in the nation. Thus, local history is not just aimed at opposing the discourse in the national histories but is also a tool of enriching these national narratives.

Doing local history, however, is not an easy task. Despite the seemingly smaller scope of study, historians are often faced with challenges in locating sources for local and specific objects of study. For example, it is much easier to study the life of national heroes than that of a local hero. Sources abound on subjects of national importance but tend to be scarce on local subjects. Nevertheless, this limitation should encourage historians to innovate and recreate local historical methodology. One important historical methodology to local history is *oral history*.



Oral history is important in the midst of scarcity in written sources, historical documents, and other material evidences. This method uses oral accounts of historical subjects, witnesses, members of the communities, and the like. Oral history primarily relies on memory. The subject or the informant will recount his experiences to the researcher as he remembers it. In other instances, the informant will relay what he learned from his ancestors or older members of the community to the historian. This nature and definition of oral history caused *positivist* historians or those who subscribe to the belief that history should be primarily based on written documents to criticize the methods of oral history. Memory is seen as something that is faulty and inaccurate. At best, positivist historians see oral accounts as mere supplement to the history written from written documents.

However, one cannot discount the importance of oral history in writing the history of underprivileged sectors and communities like the urban poor or indigenous peoples. These groups are usually left out on records. They were undocumented because of their status. In these instances, it is the task of the historian to search for alternative methods that will capture the experience and collective pasts of these communities. Oral history plays this role.

Local and oral history are important endeavors in the development and enrichment in the discipline of history. These efforts fill the gaps in the discipline by highlighting alternative areas of study and methodology toward a more holistic, inclusive, and progressive study of our past.

## Interacting with History through Historical Shrines and Museums

We have been discussing ways to study the past through variety of sources available to us. While research is a valuable tool to learn more about the experiences of the nation and our history, there exists venues where we can experience history, and these are through historical shrines and museums.

These venues for living history provide us a certain level of authority and trustworthiness that could impact the way we view the past. Through interacting with artifacts such as a World War II rifle or the clothes of a Filipino hero, we can better imagine the past beyond the mere letter and words we read and painstakingly memorize. These tangible objects are reconstructions of the past; experiencing these artifacts directly is the next best thing to actually being there when a particular event happened or a when



a historical personality lived. These firsthand experiences make historical events more real for us; and research shows that learning by experiencing aids with retention of the learning later in life.

Historical shrines and museums serve as portals to the past. But one must also take note that visiting a museum entails preparation. In the course of your study, you are bound to visit one or two of these sites. Once you know what you will be visiting, it is essential to do a background reading on the place you will visit so that you may know what to expect and you can situate the importance of the place you will be visiting in the national historical narrative. For example, a visit to the Rizal Shrine in Calamba, Laguna, will be more enriching if you are able to do a little reading about Jose Rizal's early life.

Upon arriving in the historical shrine or museum, one thing that you can do is to look for the historical marker. These markers put up by the National Historical Commission of the Philippines (NHCP, or formerly National Historical Institute or NHI) provide the basic details on what makes a certain site historical. These markers ensure that the site where it is located is indeed, of historical and cultural value to the nation.

The instructor or professor, who handles your course and who will organize your visit to the shrine or museum, should provide you with a handout or a worksheet to accomplish while in the site, and maybe, he may assign you to write a reflection paper that should represent your own critical evaluation of the site. That is why it is important to spend time reading the captions/texts accompanying the artifacts or exhibits on display. Some museums and shrines allow mobile photography and may even encourage you to take "selfies" while in the site. Take the opportunity to be able to retain more of the information being presented by these sites so that you may be guided once you are to write the paper required by your instructor or professor.

Shrines and museums are a lot more interactive now, aided by the available technology. Take the chance and participate in these interactive opportunities to experience history firsthand. Watch the videos, listen to the sounds, and enjoy the experience. This is also a great chance to analyze the artifacts since artifacts are also texts that are open for reading, interpretation, criticism, and evaluation.



## Chapter Exercises

- A. **My Life History.** Write your autobiography using only primary sources. Attach a copy of the primary source you used when you submit your autobiography.
- B. **Eyewitness Interview.** Identify an eyewitness to certain historical events in your own locality (World War II, Martial Law, EDSA Revolutions, big typhoons, and related calamities, among others). Devise your own questionnaire, interview the eyewitness, and transcribe the interview.
- C. **Shrine/Museum Visit.** Visit a local historical shrine or museum. Write a reflection paper on the said visit.

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## INDEX

### A

A Brief Summary of the *First Voyage Around the World by Magellan*, 14–22

Age of Exploration, 55–56

Agoncillo, Teodoro, 7, 66

agrarian reform, 84–92

Agricultural and Industrial Bank, 88

Agricultural Credit and Cooperative Financing Administration (ACCFA), 88

Agricultural Land Reform Code, 88–89

Agricultural Tenancy Act, 88

Agricultural Tenancy Commission, 88

Aguinaldo, Emilio, 27–28, 66, 73

Albo, Francisco, 49, 50–51

Alonso, Teodora, 47

Alvarez, Santiago, 66

American era, 31–35

Amorsolo, Fernando, 32

Annales School of History, 6

Aquino III, Benigno, 82, 102

Aquino, Corazon, 36–42, 78–79, 91, 100

Aquino, Ninoy, 37–38, 78

Archdiocesan Archives of Manila, 109

Arroyo, Gloria Macapagal, 82, 92

Ateneo de Manila University—  
Quezon City, 109

### B

Balaguer, Fr. Vicente, 63

Balintawak, 67

Bangsamoro region, 83

Barbosa, Duarte, 20

Battle of Manila Bay, 73

Bernad, Miguel A., 55

bicameral Congress, 76

biographical research, 109–11

Bonifacio, Andres, 65, 67

Butuan, 49, 55

### C

Cavite Mutiny, 56–61

Cebu, 17, 53

*cédula*, 93, 97

certificate of identification, 93

Chinben See Memorial Library, 109

Citizen Assemblies, 77

Civil Service Commission, 80

coconut, 15–16

Code of Agrarian Reform of the  
Philippines, 89–90

Code of Kalantiaw, 8, 46

collective memory, 112

Commission on Audit, 80



Commission on Elections, 80  
 Commonwealth Constitution (1935),  
     75-76  
 communist insurgency, 39  
 Comprehensive Agrarian Reform  
     Law (CARL), 91  
 Comprehensive Agrarian Reform  
     Program Extension with  
     Reforms (CARPER), 92  
 Comprehensive Agrarian Reform  
     Program or CARP, 91  
 Comprehensive Tax Reform  
     Program, 101  
 Congress (United States), 37  
 Constituent Assembly, 80-81  
 Constitution of Biak-na-Bato (1897),  
     72-73  
 Constitutional Authoritarianism  
     (1973), 76-78  
 constitutional convention, 79, 81  
 Court of Agricultural Relations, 88  
 Cruz, Hermenegildo, 47  
 Cry of Rebellion, 65-68  
 Cuerpo de Vigilancia, 63

## D

Department of Agrarian Reform  
     (DAR), 91, 92  
 Diaz, Lt. Olegario, 66  
 Duterte, Rodrigo, 83-84, 102

## E

EDSA People Power Revolution of  
     1986, 36, 38, 78  
*encomienda* system, 84-85  
 Estrada, Joseph Ejercito, 82  
 Executive Committee, 78  
 Executive Order 127, 100  
 Executive Order 229, 91  
 Expanded Value-Added Tax  
     (E-VAT), 102  
 external criticism, 8

## F

Family History Center, 109  
 federalism, 82-83  
 First Catholic Mass, 49-56  
 forced labor, 94  
 foreign debt, 39-40, 42  
 Francisco, Gabriel Beato, 47  
 Freedom Constitution, 79  
 friars, 61

## G

Garcia, Carlos P., 77  
 gold, 16  
 GOMBURZA, 56  
 Google, 106



**H**  
*hacienda* system, 85  
 Hare-Hawes-Cutting Act, 75  
 Harrison, Francis Burton, 97  
 Herbosa, Mariano, 95  
 Himno de Balintawak, 66  
 historian, 5-6, 9  
 historical interpretation, 46-47, 48  
 historical marker, 114  
 historical methodology, 5-6  
 historical research  
     in libraries and archives, 107-9  
     online, 106-7  
 historical shrines, 113-14  
 historical sources, 2-3, 6-9  
 historiography, 3  
 history  
     definition, 2  
     history of, 3  
     intended audiences, 4  
     methodology, 5-6  
     writing, 5  
 homestead program, 87  
 Homonhon, 50, 52  
 House of Representatives, 79  
  
**I**  
 income tax, 97  
 indirect taxes, 99  
*industria* tax, 94, 97

internal criticism, 8  
 Internal Revenue Law of 1904, 96  
 Internet Archive, 107  
 Internet, 106  
 Izquierdo, Rafael, 57-59

**J**  
 Jacinto, Emilio, 22-23  
 Jones Law, 75  
 Juan de la Cruz, 31, 32

**K**  
 Kalantiaw (Datu), 8, 46  
 Kalaw, Teodoro, 66  
 "Kartilya ng Katipunan," 22-26  
*Katipunan*, 7, 22

**L**  
 Ladrone Islands, 15  
 Land Settlement Development  
     Corporation (LASEDECO),  
     87-88  
 landownership, 84-85  
 Lapulapu, 19  
*Las Antiguas Leyendas de la Isla de  
     Negros*, 46  
 Leyte, 50  
 Limasawa, 51  
 local history, 111-13



## M

- Macapagal, Diosdado, 88
- Mactan, 19-20
- Magellan, Ferdinand, 14, 15-20
- Magsaysay, Ramon, 88
- Malolos Constitution (1899), 73-74
- Manila-Acapulco trade, 93
- Maragtas, 8, 46
- Marco, Jose E., 46
- Marcos, Ferdinand, 8, 76-78, 89
- Marianas Islands, 15
- Martial Law, 77, 78
- Masagana '99, 90
- Masangkay, Guillermo, 66-67
- Mazaua Island, 53-55
- Mazava, 50
- McCoy, Alfred, 31
- monopolies, 94
- Montero, Jose, 56-57
- multiperspectivity, 48-49
- museums, 113-14

## N

- National Archives of the Philippines, 109
- National Assembly, 77
- National Historical Commission of the Philippines, 114
- National Internal Revenue Code, 97-98

- National Land Settlement Administration (NLSA), 87
- National Library of the Philippines, 108
- National Resettlement and Rehabilitation Administration (NARRA), 88
- National Rice and Corn Corporation (NARIC), 87
- 1987 Constitution, 78-82

## O

- Ombudsman, 80
- Online Public Access Catalog (OPAC), 108
- "Operation Land Transfer," 90
- oral history, 112-113
- Orilla, Don Marcelino, 46

## P

- Pardo de Tavera, Trinidad, 59-60
- parliamentary-style government, 77
- Partido Sakdalista, 87
- Pavon, Jose Maria, 46
- People's Initiative, 81
- Philippine Assembly, 75
- Philippine Autonomy Act of 1916, 75
- Philippine Bill of 1902, 86
- Philippine Cartoons: Political Caricature of the American Era (1900-1941)*, 31-35

- Philippine Constitution, 72
- 1899, 73-74
- 1935, 75-76
- 1973, 76-78
- 1987, 78-80
- amending, 80-82
- Philippine flag, 28-29
- Philippine historiography, 9
- Philippine independence, 26
- Philippine Independence Act, 60
- Philippine Institute, 60
- Philippine Organic Act of 1902
- Pigafetta, Antonio, 14-15, 49,
- PIRMA, 81
- Plauchut, Edmund, 60-61
- Political Constitution of 1899.
- Malolos Constitution (1899)
- polo system, 94
- positivism, 4
- positivist historians, 113
- postcolonialism, 4
- president, 77
- Presidential Decree No. 27, 8
- Presidential Proclamation 13
- primary sources, 7, 13-14, 46
- examples, 14, 22, 26, 31,
- Prime Minister, 77
- Proclamation of the Philippine Independence, 26-30
- Project Gutenberg, 107
- Puerto, 84



Philippine Constitution, 72  
 1899, 73-74  
 1935, 75-76  
 1973, 76-78  
 1987, 78-80  
 amending, 80-82  
 Philippine flag, 28-29  
 Philippine historiography, 9  
 Philippine independence, 26  
 Philippine Independence Act, 75  
 Philippine Institute, 60  
 Philippine Organic Act of 1902, 75  
 Pigafetta, Antonio, 14-15, 49, 51-53  
 PIRMA, 81  
 Plauchut, Edmund, 60-61  
 Political Constitution of 1899. SEE  
 Malolos Constitution (1899)  
 polo system, 94  
 positivism, 4  
 positivist historians, 113  
 postcolonialism, 4  
 president, 77  
 Presidential Decree No. 27, 89-90  
 Presidential Proclamation 131, 91  
 primary sources, 7, 13-14, 46  
 examples, 14, 22, 26, 31, 36  
 Prime Minister, 77  
 Proclamation of the Philippine  
 Independence, 26-30  
 Project Gutenberg, 107  
 pueblo, 84

## Q

Quezon, Manuel L., 76  
 Quirino, Elpidio, 87, 99

## R

Raia Calambu, 16, 17  
 Ramos, Benigno, 86  
 Ramos, Fidel V., 81, 101  
 Raselis, Saturnino, 47  
 Recto, Claro M., 75  
 reduccion, 93  
 Republic Act 7716, 101  
 Republic Act 10351, 102  
 Republic Act No. 34, 87  
 Republic Act No. 1199, 88  
 Republic Act No. 2211, 99  
 Republic Act No. 3844, 88-89  
 Republic Act No. 6657, 91  
 Republic Act No. 8532, 91  
 Republic Act No. 9700, 92  
*Revolt of the Masses: The Story of  
 Bonifacio and the Katipunan*, 7  
 Rizal, Jose, 47, 110-111  
 and Katipunan, 65  
 on taxation, 95-96  
 retraction of, 62-65  
 Roxas, Manuel, 99



## S

"Sa Aking Mga Kabata," 47  
Sakdal Uprising, 86–87  
Santiago, Miriam Defensor, 82  
Scott, William Henry, 8, 46  
secondary sources, 7  
semi-presidential system, 78  
Senate, 75, 79  
Sergeant Lamadrid, 58  
Silang, Diego, 22  
Sin Tax Reform, 102  
Supreme Council, 72  
Supreme Council of Grace and  
Justice, 72  
Supreme Court, 80

## T

Tax Commission, 99  
taxation, 92–102  
textbook, 7  
tobacco, 94  
Treaty of Paris, 30  
tributes, 93  
Tydings-McDuffie Act, 75

## U

Underwood-Simmons Tariff Act, 97  
unicameral Congress, 76  
unitary form, 82  
United States alliance, 42  
University of Santo Tomas, 109  
University of the Philippines–  
Diliman, 109  
*urbana*, 94

## V

Valenzuela, Pio, 66, 67–68  
value-added tax (VAT), 100–102  
victors, 5

## W Y Z

Wikipedia, 106  
Yzamaney, Rafael Murviedo, 46  
Zaide, Gregorio, 66