

Chains of Empire, Projects of State: Political Education and U.S. Colonial Rule in Puerto Rico and the Philippines*

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In October of 1899, General George W. Davis of the United States military government in Puerto Rico issued General Order No. 160. By that time, General Davis and his forces had been occupying Puerto Rico for over a year. The war with Spain which had initially brought them to the island was finally over, and they now claimed complete control over the territory. General Order No. 160 thereby called for the establishment of municipal governments in Puerto Rico. It established municipal elections with a restricted suffrage, and empowered the newly-elected officials to carry out various duties, from policing to taxation to basic administration. Of course, the Puerto Ricans already had municipal governments, established by the Spaniards during their three hundred year reign over the island. But General Order No. 160 was supposed to mark something entirely new in that it manned the municipal governments exclusively with elected Puerto Ricans. The idea was that the Puerto Ricans, “for the first time in their history,” should be given an opportunity to manage their own affairs and acquire practical education in modern liberal governance. As General Davis stated, the new municipal governments were to serve as “a sort of kindergarten” in which Puerto Ricans could learn the ways of “popular government,” Anglo-American style.¹

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¹ Headquarters Department of Porto Rico (1899a); United States Congress (1904: 222).

That same year, halfway around the world and far into the Pacific, American military authorities issued a very similar order. General Order No. 43 in the Philippines also called for municipal governments. Literate and propertied Filipinos were to vote, the offices of municipal mayor and councilor were to be filled by elected natives, and the new officials were to carry out various administrative duties. Ostensibly, then, Filipinos would be spared the “objectionable,” “arbitrary,” and “harsh” features of former Spanish rule and “for the first time . . . adopt representative control over their own civil affairs.” As General Otis (who issued the order) put it, the new municipal governments—brilliantly colored with “the American spirit”—would give Filipinos the chance to “demonstrate a fitness for self-administration” and receive an “education” in the ways of democratic government.²

It should not be surprising that the general orders issued by the military governments in Puerto Rico and the Philippines were so similar. Both colonies were administered by the War Department, and the Secretary of War, Elihu Root, was planning to subject both to the same project of “practical political education.” By this project, Puerto Ricans and Filipinos would gain practical experience in Anglo-styled political institutions. Under America’s “strong and guiding hand,” the colonized populations would receive a “course of tuition” and acquire the “character and habits of thought and feeling” necessary for “free self-government.”³ Puerto Ricans and Filipinos would be allowed to manage their own affairs with some measure of autonomy, while American administrators would supervise and direct them from above, providing “object lessons” in American models of government. In this way, the Puerto Ricans and Filipinos would emerge from their supposedly “rudimentary stage of political development” and be disciplined into the political image of their imperialist master.⁴

The issuance of two very similar general orders by the military authorities thus marked the beginning of this larger project. Nonetheless, for all of its grandiose pretensions, the political education project did not play out in either colony as initially planned by the American policymakers and administrators. Nor did it unfold in exactly the same way in the two colonies. Despite the fact that the project was to apply similarly to both colonies, and despite its similar beginnings in each, the political education effort eventually took on divergent forms, ultimately effecting the construction of two very different colonial regimes. This essay, then, is devoted to tracking and explaining these distinct processes. I show how and why the political education project in Puerto Rico and the Philippines was altered over time, so much so that it diverged from its initial premises—and in fundamentally different ways in each colony.

² Otis (1900: 2906); United States War Department [hereafter USWD] (1900: Pt. 2, 475, 477–78).

³ USWD (1899:24–5).

⁴ *Ibid.*; Root to Lowell (1904:1). For a suggestive, Foucauldian-inspired analysis of disciplinary techniques in the Philippines during American rule, see Rafael (1993).

The analysis here joins a nascent literature on colonial states and their projects. This literature stresses that projects such as the one described here, whatever their designs, were rarely if ever realized in full.⁵ Across the imperial world, colonial state-builders and administrators pushed a range of projects, but once implemented those projects were often “deflected, or enacted farcically and incompletely.”⁶ Berman and Lonsdale (1992) have therefore drawn a distinction between colonial state-building and colonial state-formation. The first involves the “conscious effort [by planners and state-builders] at creating an apparatus of control,” while the second involves the “largely unconscious and contradictory process of conflicts, negotiations, and compromises [which] constitute the ‘vulgarization’ of power” (5). Similarly, Nicholas Thomas (1994) has urged studies which analyze the “mediation” and “reformulation” of projects during their historical activation (58). He stresses that colonial projects “are often *projected* rather than realized,” and so likens the enactment of colonial projects to the task of repairing an old car: “The cost and energy absorbed into surgery is never reflected in results, parts are replaced, but connections fail” (106; emphasis added).⁷

The political education project in Puerto Rico and the Philippines was no exception to this rule. It was *projected* to set up a tutelary regime which would teach Puerto Ricans and Filipinos the ways of American-styled democratic government. Under American control, Puerto Ricans and Filipinos would vote in free elections, take up office, help devise legislation, and administer the colony’s daily affairs—first in local (municipal) governments and later in national legislative assemblies. The native officials would be given more and more autonomy as they moved through this system, slowly learning their so-called “object lessons” in American-styled governance. Local governments would be granted more duties and functions, the legislative assemblies would be allowed to devise laws “with less and less assistance,” and in general American control would be slowly loosened. The underlying principle of political education was thus: “Free self-government in ever-increasing measure.”⁸

Nonetheless, as I have intimated, and as I will show in more detail below, the project of political education unfolded in ways that transgressed its initial premises. As the aforementioned literature on colonial projects would have it, political education was reformulated and modified once the project was

⁵ My conceptualization of colonial projects follows from Thomas (1994:esp. 105–6). Projects akin to political education include the French “civilizing mission” in parts of Africa (Conklin 1998) and the Colebrooke-Cameron reforms in British Sri Lanka (Scott 1995).

⁶ Thomas (1994:106).

⁷ Cooper and Stoler (1997:20) have called for further studies which problematize rather than assume “the hegemonic operation” and “unity and coherence” of colonial states (cf. Mitchell 1991; Scott 1995). Of course, theoretically-informed studies of the colonial state more generally are notoriously lacking, but for a novel theorization of the colonial state, see Steinmetz (1997).

⁸ For an overview of the plan, see USWD (1899:24–5). See also Clark (1973), Jones (1924), Taft (1908), and Willoughby (1905:13–15).

activated. Further, it was reformulated and modified in different directions and in distinct ways in each colony. On the one hand, political education in Puerto Rico took on a more restrictive form than initial plans dictated. American supervision over local affairs was intensified over time and disciplinary mechanisms were tightened. This violated the original principle of “free self-government in ever-increasing measure.” Rather than offering more and more local autonomy over time, and hence more and more “self-government,” the project ended up creating a centralized colonial regime. On the other hand, political education in the Philippines was much more lax than it was in Puerto Rico. American control and supervision were lightened, and disciplinary mechanisms were loosened over time. In contrast to Puerto Rico, a decentralized regime emerged in the Philippines. This pattern of decentralization followed the principle of “free self-government in ever-increasing measure,” but in actuality it far exceeded it. Not only were the Filipinos given much more autonomy than their Puerto Rican counterparts, but they were given it far more quickly than had been initially planned. American administrators themselves later complained that they had gone “too far, too fast” in loosening supervision over local affairs.⁹

My analysis of these distinct patterns thus complements the existing literature on colonial states and their projects. But it also diverges from it. Primarily, it diverges in its explanation for *why* colonial projects play out as they do. To explain why projects were so often reformulated and modified in the process of their enactment, the existing literature most often highlights tensions *within* a colony itself: resistance from local populations, the competing imperatives and contradictions of contemporaneous projects, or conflicts among colonizing agents. In contrast, I show that such internal tensions were not the only determinants of the political education project. The different forms of political education enacted in Puerto Rico and the Philippines were also determined by *translocal* tensions; that is, by tensions transcending the colonies and running all the way up to and through the metropolitan state itself. In other words, the unpredicted and unforeseen nature of political education in Puerto Rico and the Philippines was ultimately determined by tensions spanning America’s entire “chain of empire.”

I begin with a brief elaboration of this point below. I then elaborate upon it in empirical detail, showing just how the chains of American empire determined the unforeseen particularities of political education in Puerto Rico and the Philippines.

PROJECTS AND CHAINS

The existing literature on colonial rule specifies at least two possible factors when explaining why projects were so often reformulated and modified in the process of their enactment. First, local populations did not always, if ever, comply passively with the dictates of colonial power. Rather, these populations

⁹ Worcester (1921:II, 968).

posed various resistances to imposed projects, thereby complicating the efforts of colonial agents. Confronted by the unpredictable actions of the colonized, colonial policymakers and administrators often had to rework their plans.¹⁰ Second, colonial agents were not always unified in their goals. Administrators often enacted a number of colonial projects at the same time and place; further, each project was sometimes wracked with internal inconsistencies or contradictions. As a result, administrators were compelled to modify their initial plans. Sometimes they disavowed one project for the sake of another. At other times they subtly shifted the goals or operations of each project so as to mediate between competing imperatives.¹¹

These factors were certainly present while the political education project was being enacted in Puerto Rico and the Philippines. As I will show, the local populations subjected to this project did not always act as passive receptors for the “object lessons” of political education. Moreover, administrators in both colonies planned a range of other projects besides political education: the construction of public schools, development of infrastructure, and American capital investment in agriculture. Both of these factors thereby complicated the project of political education, creating a variety of tensions. Proponents of the project had to deal with subtle forms of native resistance and had to mediate between the conflicting imperatives of their other developmental projects.

Nonetheless, what is most striking is that the administrators in both colonies faced the same sort of tensions. In Puerto Rico as well as in the Philippines, local populations resisted the dictates of political education—and in very similar ways. Moreover, in both colonies, administrators planned to enact the very same projects contemporaneous to the political education effort: not surprisingly, since they were following the general state-building plans of Elihu Root (their supervisor in the War Department). This parallel suggests that the different forms taken by the project in the two colonies were not solely the result of resistances from below or the competing imperatives of other, simultaneous projects. Something more was going on.

It is here that an understanding of what imperial chains becomes crucial. By “chains of empire,” I mean the numerous and multifaceted links which colonial rule necessarily entailed. Together these links fueled a range of translocal tensions with which colonial administrators and planners had to cope.

¹⁰ The literature on this is extensive, but see, for example, Cooper (1994), Finlay (1998), Rafael (1993), and Stern (1992). Ortner (1996) provides an illuminating critical discussion of the “resistance” literature.

¹¹ E.g., Berman and Lonsdale (1992) stress the contradiction between the imperatives of maintaining political legitimacy and capital accumulation. See also Comaroff (1997:ch. 8). A third possible reason is that actors arriving to the colonies from the metropole had their own distinct intentions and interests. Settlers and missionaries, plantation owners and capitalists—they all had their own particular projects, which often conflicted with each other. Such conflicts made for a range of tensions and, consequently, each of their projects suffered. On this point see especially Thomas (1994). See also Comaroff (1992:chapter 7; 1997:21) and Margold (1995). For a broad overview of this literature see Cooper and Stoler (1997:4–8).

The first and perhaps most obvious link in the chain of empire is that between colonizer and colonized. Colonial rule established lasting connections between peoples previously separated. At a minimum, it placed agents of the colonial state and colonized peoples into direct and sustained contact with each other. Colonial state administrators faced local populations over whom they were to rule and onto whom they imposed their projects; local populations, in turn, faced a new colonial state to which they were to defer, at least in theory. This link was certainly wracked with conflict, as local populations resisted the efforts of colonizing agents, but it was a link nonetheless. Whether in collaboration or conflict, “colonizer and colonized” confronted each other. The actions of one thus shaped the actions of the other.¹²

Such links within the colonies were concomitant with a series of other links. While colonial states and administrators were connected to local populations, for example, they were also connected to the imperial center at home. They were accountable to a metropolitan-imperial state that commanded them from above. In turn, the metropolitan authorities themselves were accountable to other actors. On the homefront, imperialist intervention called forth a range of social forces. Imperialists and anti-imperialists, corporations and capitalists, even labor unions and religious groups—all of these domestic actors had their own agendas in relation to empire, and they often pressed them directly upon the metropolitan-imperial state. Anti-imperialists pressured the state to loosen imperial control, while imperialists lobbied for its tightening. Domestic labor unions, fearing the influx of cheap labor from the colonies, pushed the state to enact anti-immigration laws, while corporations sometimes pushed for the opposite. Colonial rule was therefore part of an extensive series of links that transcended particular actors and locales. It entailed a translocal chain which linked colonized populations, colonial administrators, branches of the imperial state, and various social groups on the homefront. Everyone was entangled, and they did not always pull in the same direction.¹³

All of this would imply that colonial projects were not only shaped by colonizing agents imposing their will upon the colonized, however contradictory

¹² By “colonial rule” I am speaking more specifically of “modern colonialism,” not only the colonialism defined simply as the presence of settler populations. For this definition of colonial rule, see Horvath (1972). The Comaroffs (1997:15–29) provide a more recent conceptualization of colonialism.

¹³ My argument about chains of empire extends work in existing studies, which allude to the place of the colonial state within larger imperial connections, most notably Conklin (1998), Berman and Lonsdale (1992), Comaroff (1992:265–95; 1997:22–23), and Vincent (1988). This literature, however, most often treats colonial-metropolitan links in terms of how they effect the discourses of projects (i.e. how colonialists bring ideological baggage with them from the metropole), the ways in which projects in the colonies are similar or analogous to domestic ones, or how ideological shifts in the metropole shape projects in the colonies. I examine, instead, specific practical or institutional links between colonial actors and metropolitan state branches and interests. My approach has been most directly informed by Berman and Lonsdale (1992:esp. 152–54), though they tend to reduce metropolitan-colonial relations to logical contradictions between the imperatives of accumulation and control, downplaying more complex contingencies such as the actions of colonized actors or political struggles of diverse agents in the metropole.

those impositions may have been. Nor were colonial projects shaped merely by the conflicts between colonial administrators and resistant local populations. While these factors were certainly important, colonial projects were also shaped by the maneuvers of actors in the metropole, not least as those actors endeavored to realize their own distinct agendas in relation to empire. Projects on colonial ground were thus subject to the pulls and tugs of *all* the actors in the chain of empire.

This was indeed the case for the political education project in Puerto Rico and the Philippines. The implementation of this project was determined by translocal tensions running along America's chain of empire, and not only by tensions or conflicts within each colony. No doubt, proponents of political education (such as colonial administrators and War Department policymakers) faced local resistance from below, and they certainly had to deal with the competing imperatives of their other projects. But they also had to deal with the metropolitan state and domestic actors pushing their agendas onto that state. More specifically, proponents of the project had to deal with the United States Congress and the domestic groups it represented. Congress and domestic groups had their own respective plans for each colony, and as they struggled to realize their plans, they pulled the colonies in different directions. Ultimately, the political education effort was pulled likewise.

To make this point, I will first discuss the beginnings of political education during military rule and the onset of civil rule (c. 1898–1901). The beginnings of the project were remarkably similar in the two colonies. Elihu Root and his colonial administrators had similar visions of this plan, and began to carry it out in similar ways. Further, they tied to this endeavor the same set of other projects, and in both colonies they faced the very same kinds of local resistance. It was only when the U.S. Congress and the domestic interests it represented exerted their influence on the colonies that the initially similar state-building trajectories began to diverge, ultimately making for a restrictive form of political education in Puerto Rico and a relatively lax form in the Philippines.

MILITARY RULE: "A SORT OF KINDERGARTEN"

Political education in Puerto Rico and the Philippines began during military rule, under the direction of Secretary of War Elihu Root.¹⁴ In 1899, military commanders in both colonies issued their respective general orders and thereby established municipal governments—the very first step in the overall plan. The immediate effects of this step were the same in the two colonies.

First of all, the new municipal offices in both colonies were quickly monopolized by the local elite—wealthy landowners, merchants, and, to a lesser extent,

¹⁴ Elihu Root had been charged by President McKinley with formulating and supervising colonial policy. Root's War Department was in charge of the colonies in the absence of a colonial office proper, and in the absence of explicit congressional legislation on the matter. Root thus articulated the project in the summer of 1899, while informed by reports from military commanders and investigative commissions in the colonies (May 1980:5–8; Rafucchi de Garcia 1981:45–51). His basic plan is outlined in USWD (1899:24–30).

educated professionals.¹⁵ In Puerto Rico, the first elections saw an overwhelming victory for the Federal party, led by coffee and sugar *hacendados* who had previously clamored for political autonomy from Spain, and who now saw new political opportunities in United States rule.¹⁶ For them, *la America del norte* was the “State of States,” the “Republic of Republics,” which carried with it the “flag of prosperity and progress.”¹⁷ They believed that American rule would bring unprecedented political blessings to the island. They also hoped that it would offer new markets for their sugar and coffee.¹⁸ In the Philippines, the elite also took up local office. Of course, some among the Filipino elite had already begun to resist American military domination, resulting in guerilla warfare in many parts of the archipelago.¹⁹ Nonetheless, just as the rebels in certain provinces armed themselves, their wealthy and educated counterparts took up office in the American-controlled areas. By 1900, most of the insurgents had dropped their arms. However violently they had resisted, nearly all of the Filipino elite soon realized that U.S. rule would not displace them politically. Like their Puerto Rican counterparts, they began to participate in the new order.²⁰

With the local elite in each colony inserted into office, the military authorities began activating the basic logic of political education. On the one hand, they subjected the new municipal offices to their supervision and control. In Puerto Rico, U.S. military officers had the right to inspect local affairs and “report all errors of administration, mismanagement or failure of any kind on the part of Municipal Officers to administer the Government properly.”²¹ Military officers in the Philippines had similar powers, claiming the right to “exercise authority in exigencies.”²² On the other hand, military authorities gave municipal governments some measure of autonomy to carry out their various duties—formulation of local ordinances, collection of taxes, even municipal policing. In Puerto Rico, for example, General Davis determined that the towns should “be let alone and free to administer their own affairs.”²³ In fact, when Davis received complaints from local native officials that American military officers were interfering too much with town councils, he swiftly reprimanded the officers.²⁴ In the Philippines, too, military authorities shied away from too much

¹⁵ This was in accordance with Root’s vision. He had called for property and literacy restrictions on the electorate and officeholders. Only later were the restrictions to be lifted.

¹⁶ On the formation of this party, their sociological bases, ideology, and leadership see Negrón Portillo (1972: 1980:37–49, 53–69) and Quintero Rivera (1981:16–34).

¹⁷ Negrón Portillo (1980:56, 149).

¹⁸ Carroll (1899:776–86); Federal Party of Puerto Rico (1899); Garcia (1989).

¹⁹ The literature is large, but see Zaide (1954:292–360).

²⁰ May (1984:546, 553–55); Owen (1979:586–88); Cullinane (1989:72–78). For elite perceptions of American rule in this regard, see Go (1999b).

²¹ Headquarters Department of Porto Rico (1899b:1). For specific practices see Berbusse (1966:106) and Picó (1998).

²² Otis (1900:2906); USWD (1900:Pt. 2, 478). See also Owen (1979:586).

²³ Brig. Gen. George W. Davis to Elihu Root (October 14, 1899).

²⁴ Berbusse (1966:95).

centralization, and were determined to give municipalities enough room to follow their own “impulse and initiative.” The role of the local military agents was to be strictly “supervisory.”²⁵

The military governments in both colonies thereby tried to maintain a balance between central control and local autonomy. This was precisely the sort of balance which Root had called for. There was to be just enough autonomy so that the native officials could perform government functions and acquire experience, just enough control so that they could perform properly and learn their object lessons adequately.²⁶ Of course, at this time the balance between central control and local autonomy was not yet regularized. The degree of local autonomy and the intensity of control over local officials were not formally instituted. The role of the military commanders was limited to building local governments and laying down the basic groundwork for future political education efforts. They therefore exerted relatively little energy towards systematizing their educative efforts. Sometimes they handled abuses of power by native officials with scoldings. At other times, they removed native officials from office completely. It was a precarious brand of political education—“a sort of kindergarten” indeed.²⁷

The precarious balance between autonomy and control, however, did not undermine Root’s basic plan. The American civil administrators were soon to take over from the military officials, and under this new direction political education was to be enacted to its fullest. The relatively loose kindergartens of military rule were to be transformed into more properly institutionalized schools of politics. Thus, as the civil administrators took control in both colonies in 1900, Root instructed them to institute the specific duties and functions of the municipal governments. This would firmly establish the level of autonomy enjoyed by the municipalities. By the same token, Root instructed the civil administrators to institute a system of surveillance and discipline to guide, teach, or otherwise punish native officials. The long-term view was that as the natives learned their lessons in governance, the civil administrators would slowly tip the scale towards “free self-government in ever-increasing measure.”²⁸

CIVIL RULE: “CORRUPTION” AND “CIVILIZATION”

Political education unfolded very similarly in the two colonies during the first phase of civil rule, just as it had during military rule. Indeed, not only were the civil administrators in both Puerto Rico and the Philippines charged by Root with the same set of instructions for instituting political education, they also

²⁵ Gates (1973:132); USWD (1900:Pt. 2, 476).

²⁶ USWD (1899:27–29). See also Willoughby (1905:15–16).

²⁷ The quote is from General Davis (United States Congress 1904:222). For the practices of military authorities in Puerto Rico, see Berbusse (1966:77–110), Pico (1998), and USWD (1902); on the Philippines see Otis (1900) and USWD (1900:Pt. 2, 475–89).

²⁸ On these plans for civil rule, see for example USWD (1899:28) and Worcester (1914:984).

faced very similar situations in the colonies. Specifically, they both faced resistance from below, and both planned to enact the same set of other, contemporaneous projects.

Upon entering office in 1900, the civil administrators in both colonies quickly learned that the native officials were not strictly following their prescribed duties. In Puerto Rico, for example, administrators found that the Federals who were occupying municipal governments had been using office “merely as a means for furthering private ends.” They had been deploying their institutional prerogatives “for the purpose of aiding their friends” and for “gratifying personal and political enmities.”²⁹ Moreover, municipal *alcaldes* (mayors) were using local police forces “as a weapon to favor the political party to which [they] belonged” and were engaging in financial fraud. It was “open and notorious that . . . public funds were not duly accounted for, expenditures were improperly made, and money was being stolen by municipal officials or diverted into improper channels.”³⁰ Administrators in the Philippines discovered similar practices. Municipal officials were pocketing public funds for themselves, using the police forces as their “personal servants” and “muchachos,” and were collecting “illegal taxes” to boot. Like their Puerto Rican counterparts, they were deploying office for their own “personal prerogatives.”³¹

Political corruption among local officials was precisely the problem that political education was supposed to uproot and replace. Corruption was a major concern for Root and the administrators, who saw it as the antithesis of democratic practice, the mark of political primitivity, just like the political corruption of “ethnic bosses” in urban cities at home.³² It stood as further proof that the Filipino and Puerto Rican elite were little more than “caciques” and “oligarchs”; that they were violating the “public trust” and thus had “little conception” of what liberty and free self-government truly meant.³³

On the other hand, though, the kinds of practices that the colonial administrators coded as “corruption” were more often than not manifestations of the patron-client relations which had long structured political and social life in both colonies. Under Spanish rule, political corruption had allowed the few native office-holders to enhance and perpetuate their powers. Puerto Rican and Filipino officials had utilized the resources of their office in personal exchanges with commoners and peers, in order to cultivate debts, and hence to cultivate networks of friends and followers. Political corruption had been part of the very fabric of mercantilist government in the colonies, articulating well with the

²⁹ Willoughby (1905:127, 167).

³⁰ Rowe (1904b:145); Willoughby (1905:127; 1909a:421,431).

³¹ United States Philippine Commission (hereafter RPC) (1901:40); United States War Department (1901:I, 20–21, 31).

³² On political corruption in the U.S. see Buenker (1988), Schiesl (1977), and Silberman (1993: 268–77).

³³ Clark (1973:223); McCoy (1993:12); USWD (1899:26).

Puerto Rican and Filipino elites' interest in enhancing their social and economic capital. Thus, in confronting corruption, the American administrators in both colonies were brushing up against a certain kind of agency and resistance on the part of the colonized.³⁴

The administrators in both colonies remained hopeful in the face of such resistance, confident that they could uproot corruption by regularizing political education. Administrators in Puerto Rico emphasized that experience and education under American rule would "rapidly" advance the "civic virtues" of the people. They stressed that "object lessons [would] be furnished" and that corruption would then subside.³⁵ One administrator even projected that "within five years American ideas will have been grasped to the extent that they [the Puerto Ricans] will be able to navigate their own little government."³⁶ Members of the Philippine Commission similarly affirmed that they would soon be able to "teach" the Filipinos "the method of carrying on government according to American ideas." They reported that they were "by no means discouraged at the prospect of successfully fitting them [the Filipinos] for self-government," and that, under their benevolent direction, the Filipinos would soon "become familiar with practical free government and civil liberty."³⁷ Despite the contingencies of resistance, then, administrators in both colonies remained determined to fulfill the original principle of "free self-government in ever-increasing measure."

At the same time, the administrators in both colonies began planning a range of other state projects besides political education. These projects were all part of Root's larger vision of democratizing the colonies, fulfilling America's "unquestioned duty" to provide Puerto Ricans and Filipinos with "opportunities for . . . development in civilization."³⁸ The projects for both colonies were similar. One was to construct an extensive public education system. The new schools would teach English, rudimentary academic skills, and especially civics lessons so that the "credulous" masses could learn how to exercise their rights against the "caciques" and "bosses."³⁹ This was the "civilizing" mission for the non-elite. As the elite of the colonies had political education, so would the peasant masses receive their own kind of education in public schools.

Another project was infrastructural development. The administrators planned to build new roads and railroads, irrigation works, and communication systems. Administrators in both colonies were appalled at existing infrastructural conditions in the two colonies. The situation was especially dire in the Philippines, largely due to the effects of war. The Spanish-American war had had its detrimental effects upon Puerto Rico's infrastructure as well. Administrators in both

³⁴ On the Philippines see Go (1997:52–53; 1999b), May (1980:54), and Sidel (1995:149–61); on Puerto Rico see Cubano Iguina (1997:413–14) and Go (1999a).

³⁵ Governor of Porto Rico [hereafter GPR]: (1901:98, 106).

³⁶ Groff (1900:104–5). ³⁷ RPC (1901:I, 21). ³⁸ USWD (1899:24).

³⁹ Quoted from Taft (1908:27). On education in the Philippines, see Margold (1995) and Salamanca (1968:76–95). For Puerto Rico see GPR (1901:49–52, 73–74) and Negrón de Montilla (1975).

colonies therefore saw a desperate need to modernize existing infrastructure and carry the colonies into the light of “civilization.” To wit, administrators placed great emphasis on road building because, as one of them put it, “there can be no civilization without means of transportation.”⁴⁰

The final project was economic development. Prefiguring modernization theories of democratization, Root stressed to administrators that economic prosperity was crucial for democratic state building. “If the people are prosperous and have an abundance of the necessities of life” he wrote, “they will . . . with patience be easily educated.”⁴¹ He particularly emphasized the role which American capital investment should play, but not simply to please American capitalists. Espousing the theories of Charles Conant (a prominent economist whom Root enlisted as an advisor), Root stressed that American capital investment would have a progressive and beneficial influence, both indirect and direct. American capital would solidify private property and wage-based social relations, instill an individualistic labor ethic and secular modes of consciousness, and create wealth for the population as a whole.⁴²

On this the administrators agreed. Like Root, they too were enamored by the ostensibly benevolent influence of American capital, especially were it to be invested in agriculture. Governor Allen in Puerto Rico wrote that American capital, with all of its “push and energy,” would “proceed to make at least five spears of grass to grow where one had grown before, to the immense and permanent prosperity of the island.”⁴³ Philippine Governor Taft wrote that with American capital would come the “moral improvement and the education of the people.” Yankee capital would promote “Yankee ingenuity, Yankee enterprise, and Yankee freedom.”⁴⁴ Thus, along with Root, administrators in both colonies called for the creation of central banks, efficient monetary systems on the gold standard, and reduced tariffs or even free trade between the United States and the colonies, along with other measures aimed at jumpstarting economic growth and attracting capital investment.⁴⁵

In short, political education unfolded similarly in the two colonies at the onset of civil rule, just as it had previously during military rule. Local conditions in the two colonies resembled each other closely. Thus, not only was political education set to follow the same trajectory in Puerto Rico and the Philippines, so too was the larger process of development in “civilization.” It was as if Roots’ initial visions of tutelary state building would be readily realized in both colonies.

The problem was that Root and the administrators were no longer the only actors involved in directing colonial affairs, although they had been initially. During military rule, for example, colonial affairs had been under the control

⁴⁰ Elliot (1917:273). For specific infrastructural plans in Puerto Rico, see Carroll (1899:38) and GPR (1901:321). For the Philippines, see RPC (1901:62–64, 71–76).

⁴¹ USWD (1899:30). ⁴² On Conant see Parrini (1993) and Sklar (1988:78–84).

⁴³ GPR (1901:98–99). ⁴⁴ Quoted in Alfonso (1969:243).

⁴⁵ Gannon (1979:423); GPR (1901:37–42, 59); Golay (1984:237).

of the metropolitan executive branch. The colonies were in the hands of the armed forces, and as commander-in-chief President McKinley had final say on all matters. As long as military rule was in place, only the president could direct colonial affairs, and he had done so precisely by delegating responsibilities to the War Department and Secretary Root.

But civil rule was not designed to work that way. According to the Constitution, civil rule was subject to the legislative branch of the state—namely, Congress. While the War Department would still direct and administer the colonies, Congress would have control over certain areas of colonial affairs.⁴⁶ And when Congress, along with the domestic interests it represented, began to exert that control, the chains of empire began to pull the colonial administrations in different directions.

ENTER CONGRESS, COMMERCE, AND CAPITAL

One of the most important areas of colonial affairs over which Congress had control was commerce between the U.S. and its new colonies. Only Congress could enact trade legislation. Only Congress could determine, for example, whether or not duties would be placed on goods to and from the colonies, and if so, at what rate. Of course, this was strictly an economic matter having no direct bearing upon political education proper. But it was still linked to the overall plans of Root and the civil administrators, who were hoping for a reduction in the existing Dingley tariffs on goods to and from foreign states in order to attract American capital investment to the colonies. In their view, some kind of reduction in those tariffs would offer an incentive for American capitalists to invest, and would provide a particular incentive for American capital to set up large plantations.⁴⁷ But since Congress alone had the privilege of determining commercial policy, those plans were linked to forces over which Root and the administrators had little control.

Indeed, when the trade issue emerged in Congress, conflicts emerged between various domestic interests. On the one hand, a group of capitalists joined Root and the administrators in their plans to attract American capital. Sugar capitalists such as Horace Havemeyer of the American Sugar Refining Company had been expressing interest in investing in Puerto Rico and the Philippines from as early as 1898, and continued to press for free trade.⁴⁸ Mining companies interested in investing in Luzon and wheat growers of the Northwestern states looking for new markets all pressed for free as well.⁴⁹ On the other hand, domestic agriculturists and workers urged Congress to keep tariff rates high. Since both Puerto Rico and the Philippines were sugar producing countries,

⁴⁶ For a brief discussion of some of the political developments leading to this distribution of imperial power, see May (1980:4).

⁴⁷ See, for the Philippines, RPC (1903:I, 6–8).

⁴⁸ Ayala (1994:198); Gould (1958:97); Welch (1979:82).

⁴⁹ Leech (1959:490); Welch (1979:82).

sugar beet farmers in the U.S. were adamant about maintaining high tariffs. They even pressed for legislation that would limit the amount of corporate landholdings in the colonies to prevent American sugar corporations from forming large-scale sugar haciendas. Tobacco farmers were likewise adamant on the tariff, fearing competition from Puerto Rican tobacco. Thus, the Beet Sugar Manufacturers' Association, the New England Tobacco Growers' Association, and the League of Domestic Producers all opposed free trade and lobbied for high tariffs on goods coming in from the colonies.⁵⁰ They were joined in this by a number of American anti-imperialist groups, who wanted high tariffs and restrictions on corporate landowning because they hoped that this would halt possible economic exploitation of the colonies by the American trusts.⁵¹ Such opposition made Root and the administrators nervous. Fearing that a high tariff would halt the influx of "Yankee capital," Governor Taft wrote to Root from the Philippines: "We are all on tenter-hooks of expectation."⁵²

In the end, Congress granted free trade for Puerto Rico. The Foraker Act of 1900 contained a stipulation that while tariffs would remain at fifteen percent of the existing Dingley rates, they could be declared null "whenever the [Puerto Rican] legislative assembly should enact and put into operation a system of local taxation sufficient to pay the expenses of the government."⁵³ A very different outcome followed for the Philippines, however. The 1901 Spooner Bill and the subsequent Philippine Tariff Act of 1902 provided only a twenty-five percent reduction in the tariff on goods coming from the Philippines, much less than the seventy-five percent reduction called for by administrators in the Philippines. Moreover, Congress restricted the amount of land which corporations could purchase there to 1,024 hectares (2,530 acres).⁵⁴

A number of factors were at work in shaping the conflicted stance which Congress took towards the colonies. One was that American capitalists were more divided on the Philippine trade issue than they had been on the Puerto Rico issue. While sugar capitalists had made plans to invest in the Philippines, other manufacturers and traders showed less interest. To them, the Philippines was too far away from Americas' historical field of influence to make investment seem profitable, and the Philippine-American war had made it appear even less so. At best the Philippines could serve as a gateway to the China market, not as a fruitful field for investment itself.⁵⁵ By contrast, business interests were more unified in their zeal for access to Puerto Rico, which was well with-

⁵⁰ Francisco and Fast (1985:213, 242–43); Gould (1958:92–93); Rafucchi de Garcia (1981:76–77); San Juan News (29 December, 1899, p. 1).

⁵¹ Welch (1979:ch. 5); Leech (1959:487–90). ⁵² Taft to Moses (1901).

⁵³ GPR (1902:9). On the Foraker Act see Rafucchi de Garcia (1981).

⁵⁴ May (1980:156); Salamanca (1984:105–116). In Puerto Rico, the Foraker Act also put restrictions on land ownership, but apparently the restrictions went unnoticed, remaining a dead letter throughout the American period (Diffie and Diffie 1931:75).

⁵⁵ Welch (1979:76).

in America's historical sphere of influence, and where the native population had not led a violent resistance movement against American rule.⁵⁶ Another reason for this divergence was timing: the trade issue was decided by Congress for Puerto Rico before it was worked out for the Philippines. Free trade had already been declared for Puerto Rico by the time the Philippine tariff issue came up. The anti-imperialists and agriculturists, who had already lost their case for high tariffs on Puerto Rico, were that much more determined to restrict capital investment in the Philippines. They were not about to lose again and pressured Congress accordingly.⁵⁷ The sugar capitalists who had initially called for reduced tariffs on Philippine trade apparently made little effort to stop the opposition. Perhaps it was because they were getting little support from other sectors of the business community. Perhaps, too, it was because they already had Puerto Rico.

In any case, even though Root and the administrators had similar visions and plans for the two colonies, other actors did not. Anti-imperialists, sectors of the business community, and sugar beet farmers all had their own distinct agendas. And even though they were all maneuvering in the United States, they were nonetheless linked to the distant colonies. The chain of empire connected their meeting rooms and platforms to Congress and then out to the imperial periphery. The result was free trade for Puerto Rico, high tariffs for the Philippines.

This fact had crucial and distinct implications for the colonial administrations. On the one hand, administrators in Puerto Rico were granted free trade. The incoming American capital generated by such trade would be a key tool in the realization of their developmental dreams. On the other hand, the administrators in the Philippines were given no such tools at all, and their developmental plans were thus shortcircuited. The administrators in each colony were pulled in different directions. As a result, they would begin to envision and enact political education very differently than they had before.

THE PHILIPPINES: SPINNING THE "WHEELS OF DEVELOPMENT"

Administrators in the Philippines were determined to make political education work, and were confident that they could teach Filipino officials the American "method" of government. After entering office, then, these administrators made efforts to tighten control over local affairs. Foremost, they grafted onto the existing municipalities a system of provincial governments (akin to American states at home) and made it the duty of the provincial governments to inspect

⁵⁶ Berbusse (1966:152); Luque de Sánchez (1980:110). Thousands of businesses sent letters of interest to the U.S. consul in San Juan soon after acquisition; the National Manufacturers' Association and the New York Merchants' Association both supported free trade. See Deitz (1986:104, fn. 71), Berbusse (1966:152) and Luque de Sánchez (1980:110).

⁵⁷ See May (1980:156) and Perkins (1962:211). Labor, moreover, was more fearful of job competition from Filipino immigrants than they were of job competition from Puerto Ricans, not least because of the large number of Chinese-Filipinos (Foraker 1900:470).

the municipalities underneath them. Provincial boards were to review municipal ordinances and annul any undesirable ones, and the provincial governor was to make periodic inspections into municipal affairs. The board members and the elected governor were Filipinos, but they were to be watched by Americans assigned to the boards as provincial treasurers. Those American treasurers would be crucial for surveillance: they were to ensure that the Filipino officials were carrying out their duties, and that the Filipino governor was properly inspecting the municipalities below and reporting any corrupt activities. Moreover, the American treasurers were to keep tight reins on municipal finances. Lastly, the Executive Bureau in Manila was to receive all complaints of corruption, and ensure that the guilty were tried or reprimanded, depending on the nature of the offense.⁵⁸

Through these measures the administrators endeavored to institute a more regularized pattern of surveillance that would uproot the local corruption left behind by military rule. The scope of the measures indicated just how serious the administrators were in following Root's plan for political education. But as these measures were being instituted, the administrators received word from home that they would not get their desired tariff reduction. Their disappointment cannot be overstressed. They had placed great emphasis on providing incentives for "Yankee capital," and the "Yankee freedom" it was supposed to bring. Free trade was also expected to bring increased commercial activity and thus feed state coffers so that infrastructure and public schools could be properly funded. In fact, Governor Taft had planned that the state funds for infrastructure and schools would come from land and local commercial taxes, revenues which were to have been increased by an influx of American capital investment.⁵⁹ So important was this plan that Taft had written to Root: "It would be like running on one wheel to develop this country without power to offer investments to capital."⁶⁰

With the congressional disappointment, though, Taft and the rest of the Philippine commissioners were indeed left with "one wheel." Administrator Williams complained that the legislation enacted by Congress "effectually ties the hands of the Commission so far as developing the resources of the islands is concerned, without which development no general prosperity can be expected . . . No action whatever was taken [by Washington] to relieve us of our unfortunate currency muddle."⁶¹ Taft complained likewise that the congressional decision to keep tariff rates high and restrict corporate landowning "stops absolutely the investment of new capital."⁶² He learned quickly that American capital, like the American constitution, does not always follow the flag.

⁵⁸ Cullinane (1971:19–23); Forbes (1928:I, 154–56); RPC (1901:9–10); Taft (1908:34).

⁵⁹ Golay (1984:237); RPC (1902:I, 7). ⁶⁰ Quoted in Alfonso (1969:245).

⁶¹ Williams (1913:164). ⁶² Quoted in May (1980:153).

In the long-term, the absence of American capital investment contributed to the persistent landed power of the preexisting Filipino elite.⁶³ But in the short term, it meant that the administrators faced a serious dilemma. How could they spin the “wheels of development” at all, without American capital investment? To solve the dilemma, administrators such as Luke Wright and Cameron Forbes came up with specific strategies. First, since the colonial administration could not rely on revenues derived from increased trade, they decided to turn to create new taxes. One was a simple head tax, a reenactment of the Spanish *cedula*. The administrators had originally not planned to impose this tax, but now they felt they had no choice.⁶⁴ Another was a special tax whose receipts were allocated for the construction of roads. It, too, had not been originally planned, as the administrators had hoped that road building could be funded by the revenues from capital investment and increased commerce.⁶⁵ Both taxes were to provide the much-needed revenues now lost in the congressional disappointments, thus enabling infrastructural development and the construction of public schools.⁶⁶

This, then, was a modification of original revenue plans, a new strategy for funding “development in civilization.” But the new plan came with a hitch: active collaboration with the Filipino elite. The Filipino elite were the only ones who could help collect the new taxes and mobilize local populations.⁶⁷ The provincial elite were especially important. Unlike the urban-based elite (the merchant and professional class in Manila), the provincial elite were grand patron-landlords, subsuming local peasants under their control. As the longstanding mediators between local populations and the central Manila authorities during Spanish rule, only they had the capacity for carrying out the new revenue plan.⁶⁸ It is thus notable that, before the congressional decision, administrators had cultivated collaborative relations with the Manila-based elite. But as the new taxation strategies were formulated, administrators disavowed these past connections and turned their attention to the provincial elite, cultivating new ties with them and offering them numerous concessions in order to enlist support for their new strategy.⁶⁹

These concessions ultimately made for a loose and lax form of political education. One concession was increased local autonomy. The administrators slowly but surely began to loosen their control over the local governments. One

⁶³ Rivera (1991:67) shows that in the 1920s and 1930s the Filipino elite remained in clear control over landed and merchant capital. Indeed, although free trade for the Philippines was finally declared in 1909, by that time American capitalists had little interest in the archipelago, leaving the Filipino elite alone to benefit from it (May 1980:160).

⁶⁴ Luton (1917:144). ⁶⁵ Forbes (1928:I, 371–83).

⁶⁶ Golay (1984:238–39); Luton (1971:144). ⁶⁷ Forbes (1928:I, 370–75).

⁶⁸ I use the term “provincial elite” to refer to the elite residing in the rural areas outside Manila.

⁶⁹ Cullinane (1971:36); Worcester (1921:II, 967–68). On the collaborative turn, see Cullinane (1989:155–56) and Paredes (1988).

step taken in this regard was to remove the Americans from their positions as provincial treasurers. By 1906, nearly all of the treasurers were removed and given a new office—that of public works officer, indicative of the administrators' new emphasis on infrastructural development. The effect was crucial. With the American treasurers gone, financial affairs were in almost full control of Filipinos with no direct American supervision. There were also fewer Americans in the field to ensure that political corruption was watched and reported. Instead, the Americans on the provincial boards were to pay most of their attention to the development of infrastructure.⁷⁰

A related concession was that the administrators became less insistent upon punishing corrupt officials. When they did in fact find local corruption on the part of Filipinos, they were reluctant to punish. From 1903 to 1909, less than half of the Filipino officials found guilty of corruption were actually removed from office. Written or verbal scolding was the preferred sanction.⁷¹ Even those officials removed from office were sometimes allowed to take up new positions later, with little complaint from Americans. For example, when the Americans had to appoint officials to vacant positions, these appointments were “distributed practically without regard to the previous political records of the recipients”—this because, as administrator Worcester openly admitted, the Americans expected “cooperation” from the appointed officials in carrying out the new revenue strategy.⁷² Some administrators even came to rely upon the very corruption which they had initially found so disturbing. Administrator Forbes sometimes turned a blind eye to the “illegal taxes” that many local Filipino officials had been collecting. Those illegal taxes, he had discovered, often went to the construction of roads and schools. The officials first collected illegal taxes as personal “tribute” (in Tagalog, *buwis*), just as officials had done in the Spanish days, and then returned portions of the revenues to their communities in the form of infrastructure. As long as such practices served the development of infrastructure, then, they could be tolerated to a greater or lesser degree.⁷³

After 1907, when the National Assembly was finally inaugurated, the Americans residing in the upper house sometimes allowed the Filipino delegates to pass “pernicious” bills, structured as pork-barreling. While this was contrary to the principles of political education, the Americans apparently found it useful: in return for allowing the delegates to continue this practice, the Americans expected them to pass bills which would put more money into infrastructural development.⁷⁴

⁷⁰ RPC (1907:I, 44–45). This is not to say that the American administrators had no control at all. But the control was small relative to Puerto Rico, as we will see below.

⁷¹ Cullinane (1971:29). ⁷² Worcester (1921: II, 967).

⁷³ See Forbes (1928:I, 154–59, 259–60) and RPC (1913:14).

⁷⁴ See Forbes (n.d.: journal 3, entry for May 22, 1909) and Jenista (1971:85–89).

It was all part of the administrators' new strategy of "getting things done" in the absence of Yankee capital.⁷⁵ Congress had put the Philippines into a situation in which the administrators had to adopt strategies and collaborative patterns entailing decentralization and supervisory slack. The overall result was a lax system of political education. The administrators tipped the projected balance between autonomy and control towards autonomy, far exceeding the original principle of "free self-government in ever-increasing measure." Indeed, administrators later lamented this excessive decentralization, admitting that they had gone "too far, too fast" in loosening supervision and granting Filipinos so much autonomy.⁷⁶ But by then it was too late. Doling out resources and concessions to the very "caciques" and "bosses" whom they had initially planned to discipline, the Americans at the apex of the colonial state had become less the tutors for democracy than the imperial patrons of a local patrimonial regime in formation (see Figure 1).⁷⁷

PUERTO RICO: SWEETNESS AND STATE

In Puerto Rico the situation was very different. As we have seen, Congress was more generous to the administrators there, granting them their desired free trade. Officials in Puerto Rico therefore faced the promising prospect of incoming American capital, through which their development plans could in fact be realized. This fact had crucial consequences for the administrators' perceptions and actions. The most important result was that the administrators saw the corruption of Puerto Rican officials in a different and much more threatening light than that cast upon local corruption in the Philippines. If the pillaging and pocketing of state funds were to continue in Puerto Rico and the local police forces could not be trusted to carry out the law, then American capital would face a hostile investment environment. The corruption of Federal party members in the municipal governments would stand as a serious threat to the sweet taste of sugar capital. Commander Mansfield had foreshadowed this problem in his report to the civil administrators during military rule. After acknowledging the need for capital investment, he had urged: "The political situation must change before anything can be done. Civil government under present conditions [municipal corruption] would . . . discourage and prevent the introduction of new capital for investment."⁷⁸

American capital was interested in Puerto Rico regardless, but civil administrators were nonetheless convinced that municipal affairs had to be cleaned

⁷⁵ Quote from Cullinane (1971:37). An alternative explanation for the autonomy given to the elite is that the Americans' were hesitant to evoke their ire, especially considering the recent war. This does not explain, however, why the Americans had initially made attempts to limit local governmental power and tighten supervisory control over the elite, even in the immediate aftermath of the war.

⁷⁶ Worcester (1921:II, 968).

⁷⁷ On the "patrimonial" colonial regime, see Hutchcroft (1991:420–22).

⁷⁸ USWD (1900b:87).



FIGURE 1. Doling out favors to patrimonial elites in the Philippines (from *Lipag Kalabaw*, 24 August 1907, reprinted in Paredes 1988:65).

up in order to realize capital's full promise. To be sure, the Foraker Act stressed the need to effectively regulate municipal finances in Puerto Rico, by declaring that existing trade barriers would be declared null only when municipal finances were placed on a sound basis. Not surprisingly, after Congress passed this act, colonial administrators began calling for more direct American control over municipal finances. Administrator Hollander complained that, during military rule, too much autonomy had been granted to local governments and that this was "doctrinaire, premature and certain to result, if continued, in irregularity and confusion."⁷⁹ He complained, for example, that since Puerto Rican officials under American rule had been able to collect "illegal taxes" without severe or systematic punishment, municipal finances were in complete disarray.⁸⁰ There was thus an "imperative and urgent need of revenue reform."⁸¹

Civil administrators also began calling for a reorganization of the municipal police, who were being used by municipal mayors "as a weapon" against their "political enemies," and as "organized mobs," carrying out political violence.⁸²

⁷⁹ GPR (1901:145). ⁸⁰ GPR (1901:147).

⁸¹ GPR (1901:192). See also Report of Edward Lee (July 16, 1900, File 480, Box 69, General Correspondence series, reports, Fondo Fortaleza, Archivo General de Puerto Rico [AGPR]).

⁸² Santiago Palmer to Governor of Porto Rico [sic] (May 15, 1902, File 11044, Box 167, Fondo Fortaleza, General Correspondence series, municipalities, AAGPR); see also complaints from various citizens to Governor Allen (in File 542, Box 111, Fondo Fortaleza, General Correspondence series, municipalities, AGPR). On "mobs" and policing generally, see Negrón Portillo (1990).

On one level, this practice violated the cherished principles that minority parties should be treated impartially, and that political office should not be deployed for personal or political ends. On another level, though, abuses of the municipal police force had implications for the prospect of incoming capital. The arbitrary use of police power and the associated violence threatened life and property. Governor Charles Allen complained that due to the arbitrary use of police power by local officials, "Citizens are not afforded the protection to life and property which they have the right to expect." He then stressed the importance of making "the American capitalist realize . . . that property is as well protected here as in the United States," and noted that "Capital will come here and will come earlier if people can be assured of the protection of life and property, essential to prudent business methods."⁸³

In short, the details of the congressional free trade legislation made for a situation in which municipal government corruption had to be halted. Consequently, administrators in Puerto Rico enacted a strategy quite different than that of their colleagues in the Philippines. With the aid of the Federals' enemies (the Republican party, who had taken control of the legislative assembly), they began to enact a series of measures which centralized, rather than loosened surveillance and control.⁸⁴ The first of these measures was the passage of the Hollander Act, which stripped local governments of any significant revenue-collecting functions, giving the central government the right to levy and collect all taxes, excepting local license taxes. It also set up an insular revenue bureau headed by Americans, made up of permanent, salaried corps of revenue agents whose jurisdictions did not line up with municipal boundaries.⁸⁵ The Hollander Act created separate districts, to be supervised by an American treasurer. Further, the Hollander Act created an intensive system of surveillance for detecting fraudulent behavior on the part of local officials. The system called for detailed registry books, a rigid system of assessment and payment schedules, and a hierarchical structure of internal control and supervision in order to locate and halt the "personal politics" and "bribery" which had marked earlier years.⁸⁶ Another 1902 law solidified this system further by making all municipal finances subject to direct control of the insular treasurer, invariably an American. The law demanded:

The preparation of a code of regulations, setting forth in detail the precise manner in which the municipal treasurers and comptrollers should keep their books of account, deposit all funds, audit all claims and make all payments from the municipal treasury; the requirement of systematic reports, showing the actual financial transactions and conditions, and their subsequent compilation and analysis, so that operations might be clearly

⁸³ GPR (1901:99); Allen to McKinley in Negrón Portillo (1991:164).

⁸⁴ The Republican party was made up of professionals, workers, and merchants with ties to New York trading houses (Quintero Rivera 1974:201). They had won the elections for the House of Delegates in 1900, and the American administrators held a majority on the Executive Council. The House of Delegates was part of Roots' original plan for national legislatures in the colonies.

⁸⁵ Hollander (1901:571–72). ⁸⁶ GPR (1901:167, 177–80).

seen; and the organization of a system of inspection and audit by officials attached to the office of the treasurer, in order that the department might know whether its orders were being complied with and whether municipal affairs were being honestly and efficiently conducted.⁸⁷

Such a system of surveillance and control contrasted markedly with the relatively lax system set up by administrators in the Philippines. There, as we have seen, direct American control and surveillance over financial affairs was loosened rather than tightened, as the administrators gave local governments great leeway in tax collection to make up for the projected loss of state revenue.

Another measure advocated by the American administrators in Puerto Rico dismantled nearly all of the existing municipal police forces. While under military rule there had been both Puerto Rican municipal police forces and an American-led insular police, Governor Allen suggested that the insular force be expanded, and that it replace the existing municipal forces in all but the largest cities. The goal was to ensure “protection to persons and property and efficiency and economy of administration.”⁸⁸ Thus, by 1902 nearly all the municipal police forces were dismantled and replaced by American-led insular forces. Policing was thus “taken out of the hands of the municipal authorities and vested in the insular government . . . where it could be administered in a non-political manner.”⁸⁹ The contrast with the Philippines is again worth noting. There the municipal police forces were kept intact.⁹⁰

By 1903, the American administrators had centralized the critical state functions of taxation, financing, and policing into their own hands. But this was not all. The Americans also began to punish local corruption by Puerto Rican officials in a systematic and sustained manner. In situations where officials were found to be illegally keeping their own police forces, as in Ponce in 1901, they were swiftly reprimanded by the Americans.⁹¹ The Americans even replaced the municipal police forces in the largest cities that had originally been spared by the legislation of 1902.⁹² Further, the Americans were quick to punish financial mismanagement by local officials. After the Hollander Act was instituted, for example, all of those found guilty of fraud were punished.⁹³ In addition, insular revenue agents often made unannounced inspections into municipal affairs, leading to the removal of corrupt officials from office. Such was the case in 1903 and 1904, when insular agents swept through large municipalities such as Mayaguez, uncovered financial corruption, and then dismissed incumbent mayors from office and dismantled their political machines.⁹⁴

⁸⁷ Willoughby (1910:90). ⁸⁸ GPR (1901:426).

⁸⁹ GPR (1901:402); Willoughby (1909b:431–32); Rowe (1904b:157).

⁹⁰ Forbes (1928:I, 205, 210).

⁹¹ File 1433, Box 95, Fondo Fortaleza, General Correspondence series, AGPR.

⁹² Willoughby (1909:432).

⁹³ GPR (1901:167). Detailed data on corruption was not collected, unlike in the Philippines.

⁹⁴ Miscellaneous correspondence, File 97, Box 96, Fondo Fortaleza, Government Series, AGPR.

Finally, the American Governor General consistently filled municipal vacancies with members of whichever political party did not hold a majority of the council seats. In the name of “impartiality” and respect for minority parties, that practice set up a self-sufficient system of surveillance, in which councilors of the minority party made haste to report any corrupt activities on the part of councilors from the opposing party.⁹⁵ Again, this practice stands in marked contrast to the Philippines, where administrators made little effort to achieve partisan balance, and even appointed to office Filipinos previously found guilty of corruption.

Certainly none of this was lost on the Puerto Rican political elite. Subjected to increasing controls, they soon leveled unprecedented criticisms against political education, no longer seeing in American rule the promise which they had once seen (see Figure 2). Nonetheless, the American administrators remained relatively immune. In fact, they began to articulate a new discourse in accordance with their new, centralized form of political education. In 1905, administrator Wilson wrote that the old *pueblo* ideal of municipal autonomy had to be dissolved for the sake of centralization, which he justified on the grounds that centralization was an evolutionary “Law of Nature attended,” he claimed, “by increased intelligence.”⁹⁶ Likewise, administrator Rowe remarked that only through “a highly centralized administration” could Puerto Ricans be instilled with Anglo-American principles of government. He turned for support to examples of state centralization in France, rather than to the Tocquevillian American towns about which Root had initially spoken.⁹⁷ Lastly, administrator Willoughby acknowledged that the Americans’ “exceedingly stringent” centralizing measures had “shorn” municipalities of “important classes of duties usually pertaining to local government,” but then claimed that the “necessities of the case . . . rendered such action imperative.”⁹⁸ Those “necessities,” we have seen, included not only corruption from below, but also the fact that such corruption conflicted with the interests of metropolitan sugar capital, propped from above.⁹⁹

In Puerto Rico, then, the administrators created a restrictive and intensified form of political education. Disciplinary mechanisms were regularized and central controls tightened. As in the Philippines, the initial principles of political education were altered, albeit this time in the opposite direction. Whereas the Philippine administrators loosened central control, the Puerto Rico administra-

⁹⁵ Clark (1973:225–26). See also Miscellaneous correspondence File 1084, Box 114, Fondo Fortaleza, General Correspondence series, AGPR.

⁹⁶ Wilson (1905:151). ⁹⁷ Rowe (1904a:40).

⁹⁸ Willoughby (1909:431, 441–42). The American colonialists’ emphasis on centralization, both in practice and discourse, casts in doubt any claims that American colonialists simply transferred abroad America’s “weak state” at home. They did so in the Philippines, but the case of Puerto Rico shows how the transfiguration of domestic governmental ideals in an overseas environment is not always unmediated.

⁹⁹ The socioeconomic effects of American capital investment in Puerto Rico, especially in the sugar industry, have been detailed elsewhere. See, among many others, Dietz (1986:ch. 2) and Varela (1981).

GOMO SE EDUCA AL "NIÑO"



FIGURE 2. The intensified form of political education in Puerto Rico: "How the 'Child' Is Educated" (from the *Puerto Rico Herald*, 30 January 1904).

tors tightened it. And whereas Root had called for "less and less [American] assistance" in accordance with Puerto Rican "capacity," the administrators moved in the opposite direction towards increased control. This despite the fact that administrators had initially predicted full municipal autonomy "within five years"—a prediction made before the congressional declaration for free trade and before the chains of empire pulled Puerto Rico into its peculiar position.

CONCLUSION

The story of political education fits with existing scholarship on colonial rule and colonial projects, in that political education was wracked with unforeseen complications, resulting in its two radically different forms. However, the history of political education in Puerto Rico and the Philippines also exceeds the boundaries of that scholarship, in that the project was caught up in complications which the existing literature has not fully elucidated. Most studies focus upon resistance from below, logical contradictions, and competing imperatives among different projects as the key tensions which shaped the unpredicted outcomes of colonial projects. Such factors were certainly at work in regards to the political education project. Puerto Rican and Filipino officials did not act as

docile students awaiting their “object lessons,” and political education was in latent competition with the imperatives of infrastructural development and capital accumulation. Nonetheless, internal tensions and complications alone did not make for the different forms of political education in the two colonies. As we have seen, the internal tensions and complications in these two colonies were quite similar. In both colonies administrators faced corruption from below. In both colonies they initially endeavored to enact the very same kinds of developmental programs. It was only when these internal factors were mitigated by Congress’s different stances towards trade in Puerto Rico and the Philippines that the political education effort took on its particular forms, making any latent or logical contradictions in the project more manifest than they otherwise might have been. The political education project intensified and became restrictive in Puerto Rico only after capital investment was propped up by congressional approval, thereby making the problem of corruption more pressing than ever. Political education in the Philippines became lax only after Congress failed to enable American capital investment there—a failure which stemmed from metropolitan political conflicts, and which required the sacrifice of anti-corruption efforts for the sake of infrastructural development. Ultimately, it was the tensions traversing the entire chain of American empire that shaped the way in which political education played out. Local populations and civil administrators, the War Department and Congress, anti-imperialists and sugar capital were all linked together by this chain in conflicted fashion.

The story told here might help to clarify, even as it might complicate, our picture of colonial states and their projects. It suggests that colonial projects were wracked with tension not only because of their contradictory character or because of resistances encountered from below, but also because of the structure of colonial empire itself. Indeed, if we define colonialism as mode of formal political domination exercised by colonial states, then certainly one of its key peculiarities is the chain by which colonial populations, colonial states, and metropolitan actors were necessarily linked.¹⁰⁰ Colonial domination was a formal extension of imperial state power; it occurred through the actions of colonial administrations, which were always directly linked to metropolitan states. This means that colonial rule was never simply a matter of a unified state imposing its will upon local populations, of local populations diametrically “resisting” this imposition, or even of the conflicting imperatives and actions of colonizing agents. It was also a matter of complex forces that transcended both the colonial state and the populations it ruled: forces governed by an extensive series of links joining the fate of colonial populations to the actions of diverse actors on the metropolitan homefront. It was a matter of imperial chains in which all were entangled.¹⁰¹

¹⁰⁰ Horvath (1972) provides a definition of colonialism that allows one to differentiate it from “imperialism.”

¹⁰¹ The particular forms or structures of imperial chains likely varied over time and space. For an overview of different colonial empires, see Fieldhouse (1982). For a suggestive study of early mercantilist empires and their “chains,” see Adams (1996).

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