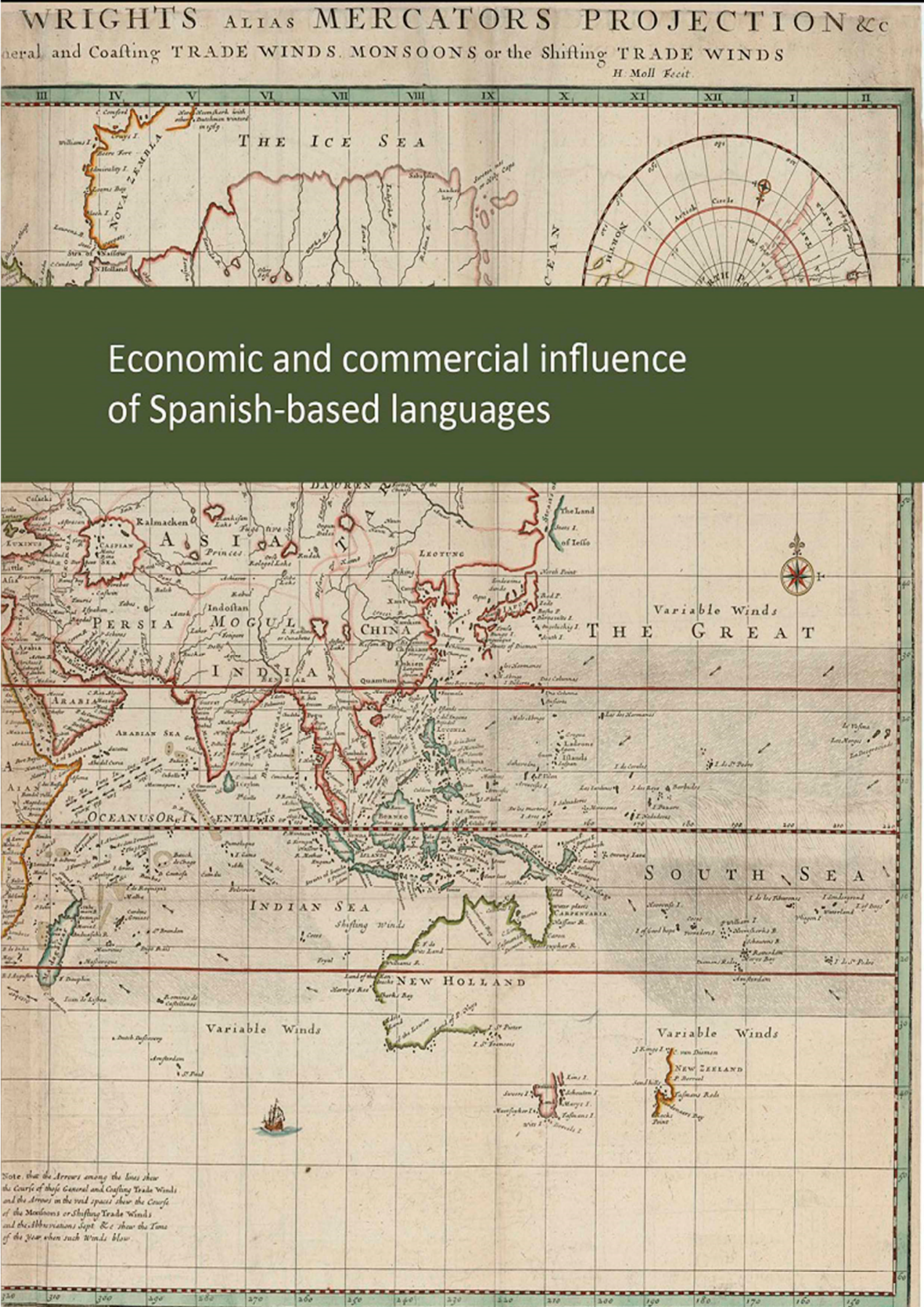


Economic and commercial influence of Spanish-based languages

The economic and commercial influence of Spanish-based languages

Madrid, 2018

The economic and commercial influence of Spanish-based languages

Catalogue of publications of the Administración General del Estado
http://publicacionesoficiales.boe.es

General Deputy Direction of Surveys, Information and Publications
Ministerio de Economía y Empresa
http://www.mineco.gob.es/portal/site/mineco/publicaciones

© First edition, 2018: Ministry of Economy and Business (Ministerio de Economía y Empresa)

With the cooperation of:

English translation: Language Interpreting Office of the Spanish Ministry of Foreign Affairs, European Union and Cooperation
Layout and cover design: Rosa Chumillas
Cover image: *Mapamundi antiguo (1700 A.D.).* Source: www.etapainfantil.com
Printed in Spain

The opinions given in this publication are of exclusive liability of the authors. The exploitation rights of this work are protected by the Laws on Intellectual Property and none of its parts shall be reproduced, stored or transferred by any mean, either mechanical or via recording, without prior written and express permission of the holders of the © Copyright.

Index

Introduction 5

Foreword.
José Luis GARCÍA DELGADO 6

The Judaeo-Spanish language.
Aitor GARCÍA MORENO 10

Haketia, Spanish, and Spanish-Moroccan Commercial Relations.
Jacobo ISRAEL GARZÓN 26

The endurance of Spanish in the Maghreb.
David FERNÁNDEZ VÍTORES 32

Equatorial Guinea: "A Hispanic country with Bantu roots".
Javier MORILLAS 47

Spanish on the language map of the Lesser Antilles.
María Asunción GÓMEZ 62

Spanish in the Philippines.
María Dolores ELIZALDE 75

Spanish in the Philippines: A state language.
Carlos MADRID ÁLVAREZ-PIÑER 89

The Chavacano language of the Philippines: Facing the challenges of the 21st century.
Carlos MADRID ÁLVAREZ-PIÑER 102

The economic value of a minority language: Chamorro in the Mariana Islands.
Rafael RODRÍGUEZ-PONGA SALAMANCA 107

Illustrations. 127

Introduction

With the publication of this monograph, the Spanish Ministry of Economy and Business aims to remember the importance of our language in the economic field, as an element that facilitates trade relations between the twenty countries that have it as an official language. It is, doubtless, an intangible asset. At the same time, the book explores the survival of Spanish in countries where it is a minority language, as is the case of the Philippines and some areas of the Maghreb.

A separate chapter deserves a less known aspect for the general public, as is the reference to Spanish-based languages that are spoken in distant parts of the world. Professionals and experts from various fields present articles dedicated to Papiamento -language spoken in some islands of the Lesser Antilles that were Dutch and English colonies-, Chabacano -Philippines-, Chamorro –Guam- and, of course, to Judeo-Spanish languages such as Ladino and Haketia, still present in certain areas of the Mediterranean and the Maghreb. The survival in these languages of Spanish words, mixed with others of aboriginal languages or with terms coming from the languages of other nations that had an influence in the area before the independence of those territories, is striking. Regarding Sephardic languages, their Spanish base is truffled with Slavic and Turkish words in the Ladino case -due to the presence of Sephardic communities in the Ottoman Empire- and with Arabic words in the case of Haketia, coming from the speech of those communities in Morocco.

The survival of these Creole and Judeo-Spanish languages is explained by the feeling of belonging to a community, sometimes quite closed, in an environment dominated by other languages. And it is this feeling of belonging provided by the common language, which generates a relationship of trust that drives business initiatives and promotes commercial exchanges between the members of the group: a collective that strives to preserve its linguistic identity within a society that is ruled by another language.

I would like to highlight the work carried out by the authors who have participated in the project, as well as the support of the Language Interpreting Office of the Spanish Ministry of Foreign Affairs, European Union and Cooperation (Oficina de Interpretación de Lenguas del Ministerio de Asuntos Exteriores, Unión Europea y Cooperación), the Instituto Cervantes, Casa Asia and Centro Sefarad. My deepest thanks to all of them for the help provided.

Santiago ASENSIO MERINO
Deputy General Director of Studies, Information and Publications

Foreword

José Luis GARCÍA DELGADO
Emeritus Professor of Applied Economics, Complutense University of Madrid
Co-director of the research project "Economic Value of Spanish"

Economics is a key reason for the leading role that history, demolinguistics, and culture have rightly awarded to the Spanish language. Today, moreover, there are new reasons for paying special attention to the economic dimension of Spanish. Obviously, the reasons traditionally cited are still valid; namely, the great cultural universe it has created—the immense collective heritage consolidated and continually renewed over time—and the vast proportions of the demographics of Spanish as a mother tongue: nearly 450 million speakers in more than 20 countries and 12 million square kilometres. But now, in addition to these well-known reasons, we can find others that are, to a certain extent, new. In brief, we can point out four of them.

Firstly—and crucially for a language like Spanish, which is a language of international communication—the fact that the economies of Spain and of the Latin American region are opening up and becoming increasingly international, in a process in line with the advances in the globalisation of production processes and of markets for goods and services. All of this expands the economic dimension of Spanish, as well as its horizon of possibilities. Spain's economy, in particular, has for decades been immersed in the dynamic process of opening its borders; the internationalisation of its major corporations in barely 20 years is simply extraordinary in its depth, ambition, and, in most cases, management.

Secondly, Spanish is playing a revitalised role as the backbone of the Hispanic community of nations. A renovated role in which a determining factor is the work of the Association of Academies of the Spanish Language —under the unquestioned leadership of Spain's Royal Academy— to provide language cohesion. This Association is responsible for a multinational language which, despite its polycentric nature, boasts a degree of standardisation that is much higher than any other major language of international communication, with all of the advantages inherent to the cohesion achieved—based on the shared production of the three major references: dictionary, grammar and spelling rules—and which lead to a major impact on the economy and on strategic relations of all kinds.

This "Pan-Hispanic language policy" designed and implemented by the Academies also serves as a fresh stimulus for learning Spanish as a second or third language. Indeed, the rapid rise in the number of people acquiring Spanish as a second or third language today is striking, and comparable to no other language: In Europe, Spanish is the second foreign language; in the United States, Spanish has surpassed French as a second language, and English-Spanish bilingualism is starting to be reflected in salaries and in job opportunities; in Brazil, thanks to the recently approved laws establishing Spanish as a second language to be studied in schools; and in Asia—not only in China—where requests to learn Spanish are multiplying rapidly, in line with trade exchanges with Ibero-America, on the other shore of the Pacific.

The fourth of these new reasons, which may sound paradoxical, is that the glaring shortcomings of Spanish as a language of science, technology, and digital communications require priority attention in terms of the economic aspects relating to Spanish. But only by drawing attention to the need for a substantial and lasting increase in its role as a vehicular language for research, and in its relevance on the internet, will Spanish be able to expand its scope in these our modern times.

* * *

In any case, studying the economics of Spanish will require agreeing upon the economic nature of a language. A language is an intangible asset that may be considered a *public good*, with unique features: It is not the exclusive property of those who use it; it may be consumed without reducing its availability to others; it is not depreciated—quite the opposite—when its use becomes massive; it has no manufacturing costs; and it generates quantifiable economic benefits, most particularly in the sphere of commercial and financial transactions, because the shared language is equivalent to a single currency that diminishes the cost of almost any exchange, facilitating cultural familiarity that bridges the *psychological distance* between the parties. This dimension is especially relevant to languages of international communication, such as Spanish, because it has intense multiplier effects for commercial exchanges and investment flows.

Indeed, the outcomes of a recent wide-ranging study (*Valor económico del español* [Economic Value of Spanish], Fundación Telefónica and Ariel, 14 volumes, 2007-2017) on the value attributable to each of those dimensions are most significant. What is the weight of Spanish in terms of income and of employment? What are its multiplier effects in the sphere of commercial and financial exchanges? How is proficiency in Spanish rewarded in salary compensation, in certain cases? Weight, leverage, prize.

As for *weight*, the most relevant figures are:

- Bearing in mind the average per capita income of the world's 572 million speakers of Spanish (according to the most recent data from Instituto Cervantes, and amounting to 7% of the world's total population), the purchasing power of the Spanish-speaking world represents approximately 10% of the world's GDP—a powerful incentive for cultural industries of products in Spanish.

- Taking into consideration the respective content or "coefficient" of a language that must be calculated in the different production activities (a calculation certainly not devoid of a margin of discretion in establishing the corresponding "weighting hypothesis"), the Spanish language contributes approximately 16% of the value of GDP and employment in Spain, and presumably similar percentages to the major economies of Spanish-speaking America.

- Cultural industries—mainly publishing, audiovisuals, and music—account for approximately 3% of these economies' GDP.

Particularly interesting is the *leverage* capacity of Spanish, as it generates multiplier effects for commercial exchanges and investment flows. The outcomes here are, perhaps, even more compelling:

- Spanish multiplies by four the commercial exchanges between Spanish-speaking countries.

- Sharing Spanish multiplies by seven the bilateral foreign direct investment (FDI) flows. Thus, our common language is a powerful instrument for business internationalisation in the Spanish-speaking world, leading to highly significant savings (nearly 2% of the total income of certain multinational corporations) in *transaction costs*.

As for the *prize*, the international labour market shows very significant data. Proficiency in Spanish not only has an impact on emigrants' choice of destination (in the case of Spain, for those coming from Spanish-speaking America the multiplying factor is approximately three); it also includes a prize in the form of a positive difference in wages (as compared with the wages of non-Spanish-speaking immigrants), reaching 30% in the Spanish market. Moreover, this prize in wages is always accompanied by facilities for labour and social integration.

As a conclusion, two additional remarks are relevant.

Firstly: Spanish can play a key role in the Ibero-American community's weight in the international order that will prevail in the time to come. The credentials of our shared language are, as stated repeatedly, promising: the second language of international communication, after English, and the second acquired language in non-English-speaking countries, as well as the second leading language on the internet. In all, Spanish can hold a privileged position if it can be properly asserted, in the cultural sphere, in the economic sphere, and perhaps even in the geopolitical sphere. In the cultural sphere, our shared language—and all of its related cultural expressions—must be the cornerstone. Economically, given our language's dynamic capacity for exchanges and investment opportunities, it can constitute an effective lever for enabling Spanish-speaking economies to advance in the world market. Lastly, language cohesion, a shared culture, and a thriving economy: a perfect combination to make a mark on the geopolitical order.

In any case, the economy *of* a language will always lead to the economy produced *in* that language, offered *in* that language, traded *in* that language. Today, Spanish has a great many features, as a Romance language with the potential to become universal, to accompany—*accompany*, not compete against—the *lingua franca*, the Germanic language that has already become universal: English. But provided that this does not depend so much on "natural" demographic growth as on the institutional quality of Spanish-speaking countries, on the competitiveness of their respective productive systems, and on the social reputation of their companies.

Secondly: Spanish, this global language that history has smiled upon, because it has been spreading for centuries without particular administrative support for its promotion, a language that is increasingly American, given its development both in North and in South America, deserves high-level policies with a twofold approach:

- On the one hand, for Spanish to become considered a merit good to all intents and purposes—also by the Ministries of Economy and the Treasury—and for

Spain to have a long-term international projection policy, with a greatly strengthened Instituto Cervantes, with the ensuing priorities involving the teaching of Spanish, support for Spanish as a working language in international forums, and, obviously, support for all cultural creation processes. A policy that goes beyond alternation between governments and political cycles; a powerful, ongoing policy. Robust public policies, in short, for a task that constitutes a high-level public responsibility.

- On the other hand, for this international projection policy to be part of a strategy, shared by Spain and by all the other countries that are also owners of this joint property, befitting the multinational official status of Spanish.

Therefore, we must avoid complacency and work to maximise the many opportunities offered by our language, which, from the outset, more than a thousand years ago in San Millán de la Cogolla, has managed to overcome the barriers of time, geography, and unity. Now that Spanish is the most international product of every Spanish-speaking country, it is time to maximise and seize the future promise it holds.

The Judaeo-Spanish language*

Aitor GARCÍA MORENO
ILC, CSIC/IUMP

As this author has explained elsewhere (see García Moreno, 2004, p. 365; 2010, p. 3; and 2015, p. 149), Judaeo-Spanish is spoken by descendants of the Sephardim, or Jews expelled from the Iberian Peninsula who settled around the shores of the Mediterranean, and especially in the Ottoman Empire. This variety of Spanish arose from the *koine*—or *koinés*, according to Quintana Rodríguez (2006, pp. 302-309)—of the different Hispanic Romance languages spoken at the time of the expulsion. Its substrate is entirely Castilian, rooted in the speech of the common people (Quintana Rodríguez, 2006, p. 298), and it developed through linguistic contact with other languages of the region, such as Italian, Turkish, and Greek, with a cultural superstrate of Hebrew—and all within a context of very low normative pressure. A variety of varieties, it is a perfect example of a linguistic diasystem (Quintana Rodríguez, 2006, p. 296) which has not only evolved over nearly five centuries, but has also presented different diaphasic or diastratic language levels (Bunis, 1982).

For obvious reasons, its creation and evolution have been affected by many factors that, in principle, have little to do with the language's internal system, but nevertheless have had an enormous impact on its development and configuration. Therefore, in the present paper we will present a historic and geographic overview of the Sephardic language, as regards the economic and trading activities carried out by its speakers and how these activities—or lack thereof, at times of crisis—have had an impact on that language.

First examples: The 16th and 17th centuries

A clear place to start is the famous quote from the *Segunda Parte de la Historia pontifical y catholica* (1st ed., Dueñas, 1565), by humanist Dr Gonzalo de Illescas, in which, referring to "Del destierro de los Iudios, de España, y otras algunas cosas notables que acontescieron hasta la muerte del Papa Inocencio VIII", he says: "Lleuaron de aca nuestra lengua, y toda via la guiardã, y vsan della đ buena gana, y es cierto q̃ en las ciudades de Saloniq̃ Cõstãtinopla, Alexãdria y enel Cayro, y en otras ciudades de contrataciõ, y en Venecia, no comprã, ni vẽdẽ, ni negociã en otra lengua sino en español".[1]

Beyond the fact that the Sephardim who settled in the Mediterranean spoke Spanish—or at least, this was the opinion of Gonzalo de Illescas and other contemporary authors[2]—insofar as the present work is concerned, I would like to

* This paper forms part of a series from the Research Project of Spain's National Plan "Sefarad, siglo XXI (2017-2020): Edición y Estudio Filológico de Textos Sefardíes" (ref. no. FFI2016-74864-P), funded by the Ministry of the Economy, Industry, and Competitiveness (MINEICO).

[1] In Gonzalo de Illescas, *Segunda Parte de la Historia pontifical y católica,* Zaragoza, Domingo de Portonaris, 1583, f. 137 v.

[2] For similar accounts regarding the wide use of Spanish in the Mediterranean, especially in the context of trade relations, see Minervini (2008, p. 35).

highlight the triangular relationship that this chronicler establishes among *the Sephardim, trade,* and the *Spanish language*.

This relationship with commerce is also clearly stated in some of the few surviving Sephardic texts from the 16th and 17th centuries, such as those in the rabbinical *Responsa* collections, i.e., works in Hebrew that collated the decisions of prestigious rabbis of the day on all kinds of issues, and in which the testimony of witnesses was often transcribed in the speaker's original language; therefore, words spoken by Sephardim appear in what we could call (proto-)Judaeo-Spanish (*cf.* Benaim, 2012, pp. 18-20).[3] In these texts we often find examples of the Jewish community's economy: sales, debt transfers, loans, etc. (*vid.* Benaim, 2012, pp. 37-43). An example of this can be seen in the following fragment from a letter of exchange signed in Venice and dated 15th of Adar I 5318; i.e., 13 February 1538: [4]

> BeVeneçia 5318, 15 adar rišón. Pagaréš por ésta de camio a Yosef 100 ducados, de ašpros cincuenta por ducado, a trenta días de llegada la ropa en Saloniqui; son por otros tantos haḇidos aquí de Reʾubén de libras 6, soldos 4 por duc[a]do. Y dichos dineros corren risgo sobre vente y ocho balas de merzas cargados en esquirazo, patrón Demo Barbare, fasta Aleso y non más; digo que de Aleso para allá non corren dichos dineros risgo. Y al tienpo le faréš buen pagamiento; y por ser ansí la verdad, fiće yo la preśente, Šimʿón.[5]

In the following text—undated, and without any geographical reference—each of two former business partners files a claim, demanding payment of debts after the breakup of their trading company when the merchandise that one was going to sell to the other was destroyed in a fire:

> "Yo demando que Šimʿón, cuando espartimos la conpañía, me_dio un escrito de su mano donde dećía en_él lo_que haḇía recibido de mí y la gan[a]ncia que haḇía y un dinero de una esclava, y después escriḇía lo_que de todo lo dicho me haḇía dado; y según aquella cuenta con lo que después he recibido, de_lo_que estonces quedaḇa dicho que me queda a_deber según aquella cuenta, como 5 mil y 500 *aspros*, que_me_los dé". *ʿ"k teḇiʿat Reʾuḇén.*
>
> "***Hešiḇ*** *Šimʿón belašón źe* que Reʾubén tenía una cantidad de dinero en mi compañía en_la botica, y cuando se quiŝo ap[a]rt[a]r de mí, me demandó su cuenta y se_la mandé por escrito; en_la cual dećía lo_que haḇía recibido de él para la conpañía, y de lo_que parecía haḇer g[a]n[a]do, y de lo que haḇía recibido como p[a]recía por aquella cuenta. Y digo agora que entonces cuando fiće cuenta y le di de aquella, fue pens[a]ndo que_no haḇía de venir el fuego y se haḇía de perder cavdal y g[a]nancia, y entonces el deḇer era que haḇía de esperar a_que se vendiesen las ropas y que se co[ḇ]rasen las ditas. Y yo, por_le f[a]ćer pl[a]ćer, le quiśe dar entonces su ħ[a]ćienda de contado, y sienpre quedaḇa a_su risco. Agora que se perdió todo, no le quiero dar lo_que restó en mi poder que quedaḇa a_su risco, más antes le demando que me torne lo_que le_he dado. Y de_lo_que diće de la esclava, tanbién la puśe en aquella cuenta, y lo primero que le p[a]gué es la esclava". *ʿ"k tešuḇat Šimʿón*.[6]

---

[3] Although not in *Judaeo-Spanish,* strictly speaking, a great deal of 17th-century documents have been preserved in a special variety of Spanish spoken by Jews, from the Sephardic community of Pisa. These include many inventories of goods and property. For a general description of these documents, see Ariza (2012). Four of these inventories have been edited and analysed in *Cuadros* (2016). For a description of the language used by Iberian Jews who settled in Italy, see Minervini (1994).

[4] For Sephardic texts originally written in Hebrew Aljamiado, I have followed the *Corpus Histórico Judeoespañol (CORHIJE)* transcription system; for details, see: http://recursos.esefardic.es/corhije.

[5] In Šemuel ben Mošé de Medina, *Šeelot uTešubot. Tešubot beTur «Ḥošen Mišpat»,* Thessaloniki, 1595, n.º 33, f. 23v-a; published in Benaim (2012, p. 239), using another transcription system.

[6] In Šemuel ben Mošé de Medina, *Šeelot uTešubot. Tešubot beTur «Ḥošen Mišpat»* (Thessaloniki, 1595), no. 95, f. 73v-b; published by Benaim (2012, p. 253), using another transcription system.

The language used by Sephardim in texts like these shows a steady incorporation of characteristics typical of popular standards (Minervini, 2008, p. 38) and, particularly in terms of the lexicon, one striking feature is the adoption of a large number of Italianisms related to commerce—terms that were generally used in the common trading vocabulary throughout the eastern Mediterranean, and from which could have been incorporated into Judaeo-Spanish from Turkish or Greek (Schmid, 2008, p. 64).[7]

At this time—although in the early 16th century there was still quite a fluid relationship between the Sephardic diaspora and the Peninsula, as Jewish converts started leaving, often seeking a return to openly practising Judaism, and although the Eastern and Western Sephardic diaspora maintained a relationship for centuries, with the exchange of people, books, letters, and merchandise, promoting cultural permeability—the process of linguistic divergence between the different Sephardic communities had already begun. In the Ottoman Empire, a gradual acculturation process began, with the linguistic absorption of other Jewish groups (Minervini, 2008, pp. 32-33).

The Golden Age of Sephardic letters: The 18th and 19th centuries

The 18th and early 19th centuries comprise what has been called the Golden Age of literature in the Sephardic language. After the 17th century, which barely saw any original works in Judaeo-Spanish and coincided with the slow decline of Hebrew literature, in the 18th century three major circumstances converged to create a flowering of Sephardic letters: a) authors committed to awakening interest in traditional religious values; b) sponsorship from newly wealthy Sephardic trading families, and c) advances in printing techniques (Romero, 1992, pp. 81-82).

During this literary heyday, the Sephardic community's economic situation and trading influence were decisive in the consolidation of a "pure" Judaeo-Spanish (*judeoespañol castizo*), the language in which some of the most important works of Sephardic literature were published. The 17th century had been marked by a major crisis in the Thessaloniki textile industry, and the Sephardim of the Ottoman Empire had lost their singular advantage over non-Muslim competitors, being replaced by Greeks and Armenians in the Empire's relations with European traders and politicians (Hassán, 1995, p. 120). On the one hand, this economic decline put an end to the patronage of rabbinical schools; on the other, it marked the economic rise of a new middle class, and the flourishing of formerly small communities, such as that of Smyrna. In any case, these events were crucial to the boom in literary production in the only language accessible to the common people—Judaeo-Spanish—while also bringing in a new standardisation of linguistic features typical of the groups that had risen socially as a result of the economic crisis, and who were often not even of Sephardic origin (Quintana Rodríguez, 2006, p. 122).

The texts of this period also offer us colourful examples of the economic and trading activities of the Sephardim. For example, in *Me'am lo'eź,* an encyclopaedic rabbinical commentary begun in Constantinople in 1730, with the publication of the volume on the Book of Genesis, by Ya'acob Julí, many stories were included about

[7] Regarding the Mediterranean *Lingua Franca* (also known as *Sabir*), see the classic work by Kahane and Tietze (1958).

civil and mercantile litigation, such as those found in the *Responsa* cited above. This is what we read in the following anecdote:

> [...] Y topamos en Reʾubén y Šimʿón que iban ĵuntos en una carroza y Reʾubén tenía una bala de algodón; lo vido a Šimʿón que estaba bebiendo una pipa de tabaco y cayeron algunas centellas sobre la carroza. Lo gritó Reʾubén diciendo que si quería beber tabaco que lo bebiera afuera, y no hiźo cavśo de su habla y se quedó adientro bebiendo tabaco. Después de una hora se alevantó aire fuerte y asopló las centellas sobre la bala del algodón y se quemó todo.
>
> Y lo obligaron a Šimʿón que pagara todo porque hiźo peširá grande, que siendo vido que se alevantó aire debía de sacudirla y amatarla bien y no pensar en beber tabaco; con-que aunque si no fuera el aire que asopló la centella sobre el algodón no se quemaba, ma con todo él fue el ʿicar de la siḇá, bifrat que ya se lo había hecho ħatraá el patrón de la haćienda.[8]

The *Meʿam loʿeź* also contains many texts regarding *picdonot*, meaning deposits or down payments, such as those titled: "*Maʿasé de uno que iba por camino, le dijo a su ḥaber 'llévame con ti este par de zapaticos'* (f. 250r); *"Maʿasé en Reʾubén que lo mandó a Šimʿón con un šeliḥut que fuera a otra civdad"* (f. 250v); "*Maʿasé de uno que guadró el picadón debaĵo de una pared de cañas"* (f. 250v); *"Maʿasé en uno que entregó el picadón a su madre y entendió la madre que era de su hiĵo"* (f. 251r); "*Maʿasé de uno que dio un picadón al ḥaber y aquel tenía de aquel modo"* (f. 251r); *"Maʿasé de uno que metió picadón ande su ḥaber y se perdió, y demanda que era todo de ducados"* (f. 252r); *"Maʿasé en uno que entregó a su ḥaber una ĵoya a torna mano"*(f. 261v); *"Maʿasé en uno que le mandó a Reʾubén una bala atada de mercancía con Leví su cuñado y no le enmentó ningún ẏierbo de picadón"* (f. 262r); *"Maʿasé de uno que puśo un picadón ande Leá y se fue Leá de la civdad y dejó el picadón en poder de su madre y se perdió"* (f. 262v); *"Maʿasé en Reʾubén que le dio a Šimʿón ducados atados que se los diera a Leví, no estaba Leví allí, los entregó a la madre"* (f. 262v); and "*Maʿasé en Reʾubén que le dio un goy suma grande de moneda y lo asentó en botica y quiso ver el goy qué tal está su trato y tomó las llaves de la botica todos los ocho diyas de Pésaḥ"* (f. 290v).

Moreover, in the collection of miscellaneous secular works by David Mošé Atías titled *La güerta de oro* (Liorna, 1778), among the *motivos para escribir una obra de contenido profano*[9] we find in one of the introductory texts, titled *"El componedor al su amigo meldador"*, we read:

> Onde espero que a_vós y a_la ĝente sabia y honrada les gustará a_meldar esta mi fatiga y entenderán que lo_que la fiće fue más por amor vueso y por el dicho gran celo que tomí en ver que todo modo de umá estampa de muchos modos de libros y ver que entre nos-otros non se halla ninguno que estampe en nuesa lingua española levantina ningún modo de libro ni de historias, ni antigas ni modernas, ni ningún libro de_ĝeografía o de otras cencias, ni tanpoco afilú algún libro que trate sobre l*a mercaderiya, que es la cosa la más aquerenciada para nos-otros ĵidiós*; amá nada de nada: que todo lo_que hay es de Ley y en lašón ħacodeš, que son pocos los que lo entienden.[10]

And indeed, trade was undoubtedly one of the activities in which Sephardic Jews tended to specialise. This can be seen in the "*LETTRES-PATENTES DU ROI CONFIRMATIVES DES PRIVILEGES*, *dont les Juifs Portugais jouissent en France depuis 1550; données à*

---

[8] In Yaʿacob Julí, *Meʿam loʿeź Šemot,* Constantinople, 1733, f. 231r; published in García Moreno (2004, p. 93), using another transcription system.

[9] This is precisely the epigraph found in Berenguer Amador (2016, p. 36).

[10] In David M. Atías, *La güerta de oro,* Livorno, 1778, f. 3r; *apud* Berenguer Amador (2016, p. 36), using another transcription system, which I have modified (*passim*). Emphasis mine.

Versailles, au mois de Juin 1776. Enregistrées au Parlement de Bourdeaux [sic]" included in *La güerta de oro*, both in the original French (ff. 6r-8) and in the Judaeo-Spanish translation (ff. 8v-10r), in which we read, citing the Judaeo-Spanish translation:

> [...] las ditas letras pasadas en_el nuestro Consejo —o seya, Diván— de Burdeos, que dan licencia, por las cosas que contienen, *a_los jidiós portugueses y españoles conocidos de_nosotros con el nombre de mercaderes portugueses y de nuevos cristianos*, tanto a_aquellos que_ya moraban en la Francia, como por aquellos que con el tienpo vendriyan a_retirarse a_morar y a_estar en_el nuestro reinado o civdades o tierras y señorías que están debajo el nueso comando y en cual-sequier cazabá o civdad de dito reinado que mejor les agradará y_ les parecerá más colay y *más provechośo para haćer los sus negocios, tanto de mercanciyas como de otras cośas*, y para vivir asegún las usanzas o leis de_ellos, tanto sus mujeres como sus criaturas y famillas y *regìdores de caśa y de magaćén y mozos, con tener el poder de comprar y de_vender y haćer el negocio, con demás comprar y_comandar todo modo de_bien, tanto de_ropas como de tierras y caśas y palacios*, y de poder faćer de ello asegún sus veluntades y asegún las leis y usanzas del nuestro reinado [...][11]

Trade and finance are among the recurring themes of *La güerta de oro*. Likewise, in "Respuesta que manda un amigo de Ṣafón a_un su amigo de Miźraḥ en 'inián de la Franquía. Y es el tarze de tratar con ellos..." (ff. 59r-63v), there are many references to different business customs, along with advice for successfully striking up trade relations with European (*francos*). Here are some examples:

> [...] por-que los francos, como non ven provecho de alguno, ni menos en la cara lo miran; amá si sabrá algún corredor —o sea, sansal— que soš hombre de parás y que haćéš ḥešbón de comprar alguna ropa o de vender, estonces veréš que luego vo_se irán refregando a_darvos los buenos días con carica riendo y con haćervos el ḥanefut de honrarvos con quitarvos el chapeo y dećirvos que vós soš su patrón y que él es vuestro mozo [...].[12]
>
> [...]
>
> Y ansí teniendo de haber de ellos, o es en ropas o es en haćiendas, faćer que vos den un papel de recibida —como a_dećir, un temesuc— que declare lo que vos debe; y si es que le contáš alguna moneda, haćervos haćer la recibida en vueso libro, porque lo mismo vos fará haćer también y él, en dándovos algunas monedas; y si él non vo_lo faće, non dejéš vós por esto de faćerlo, siendo esta es la buena regla del mercader franco y del negociar reglado en Franquía, que_haćiendo ansí non vos podrán venir por la cabeza ni belás ni ilacás con ninguno.[13]
>
> [...]
>
> Y ansí tener el cuidado de haćervos haćer luego el saldo de aquel año, y esto se entiende en declarar debajo el cuento que hasta aquel día quedó pagado de_todo y que non tiene cad ilacá con vós, porque si non, dejaréš rompimientos de cabeza a_vuesas criaturas después de vós.[14]
>
> [...]
>
> Y más vos diré que si quereréš tomar crédito en Franquía cale que seáš muy puntual en la vuesa palabra y en los pagamientos, por-que si non, aquistaréš la fama de ser mala persona o de ser un falido.[15]

[11] In Atías, *La güerta de oro*, ff. 8v-9r; *apud* Berenguer Amador (2016, pp. 46-47). Here, likewise, emphasis mine.

[12] In Atías, *La güerta de oro*, f. 59 v; *apud* Berenguer Amador (2016, p. 172).

[13] In Atías, *La güerta de oro*, ff. 59v-60r; *apud* Berenguer Amador (2016, p. 173).

[14] In Atías, *La güerta de oro*, f. 60r; *apud* Berenguer Amador (2016, p. 174).

[15] In Atías, *La güerta de oro*, f. 61 v; *apud* Berenguer Amador (2016, p. 177).

Beyond such practical advice as this, which undoubtedly give us a good idea of the economic activities of Sephardim in the Eastern Mediterranean, another highlight is the inclusion, in "Tratado 5" of the work, of a "Disputa gustośa y saƀiośa que tuve con una persona, de la cual se viene a_saƀer muchas cośas, y son: 1) Si es la tierra o la moneda lo que nos mantiene. 2) Cuála fue la cavśa de_las guerras entre la ĝente. 3) La raźón que antigamente ṿivían muchos años y agora son pocos. 4) Si fue la veluntad del Dio o la veluntad de_la ĝente a_que huƀiese la moneda en_el mundo".[16] Here, the text addresses the counterposition between *land* and *money* as a source of wealth, echoing the clash between the two economic schools in vogue during the first half of the century: *physiocracy* and *mercantilism*.

Trade relations favoured the creation of a network uniting the many Sephardic communities dispersed within (and outside) the Ottoman Empire, and the Judaeo-Spanish linguistic diasystem played an equally important role in that network, disseminating rabbinical norms associated with the Sephardic literature of the time, which eventually constituted the closest thing they had to an educated standard (Quintana Rodríguez, 2006: 107-109; García Moreno, 2011a: 10). That said, the dissemination of what we could call substandard linguistic forms, although they had not yet leaped into print, was also determined by the different trade routes. This explains, for example, how the area encompassed by Thessaloniki, Belgrade, and Ruse shares a set of linguistic characteristics absent from the rest of the Judaeo-Spanish-speaking community, since they marked the most important trade route for the import and export of goods from the inland Balkans through the port of Thessaloniki.[17] Until the end of the 19th century, this route was controlled by Sephardim, and all along and around it many communities had been founded by Thessalonian Sephardim involved in trade or manufacturing activities related to it (Quintana Rodríguez, 2006: 309-310).

Likewise, trade and Judaeo-Spanish went hand-in-hand in the emergence of new Sephardic communities beyond the boundaries of the Ottoman Empire. This is the case of the Viennese community, which arose over the course of the 18th century thanks to different peace treaties between the Ottoman and Austrian Empires, enabling free circulation of their respective subjects (Gelber, 1948: 359), leading to the establishment of Ottoman Jewish merchants in Vienna.

By the early 19th century, a considerable number of Judaeo-Spanish-speaking Sephardim from Turkey, Serbia, Bulgaria, Romania, Greece, Asia Minor, and Palestine had settled in Vienna, most of them engaged in the export trade, whether towards the Far East, the Balkans, or Egypt (Gelber, 1948, p. 367). The prosperity of the Viennese community, although it was nowhere near as large as the principal communities in Istanbul, Thessaloniki, or Smyrna—the three great publishing centres of the Sephardic world—became evident quite quickly. An example is the translation of the Bible done between 1813 and 1816 by Yisrael Bajar Ḥayim of Belgrade. This was the last pure, complete translation—based on a previous one by Abraham Asá, which appeared in Constantinople between 1739 and 1745—which was widely disseminated amongst the Sephardim of North Africa (Romero, 1992, p. 42).

[16] In Atías, *La güerta de oro*, f. 34r; *apud* Berenguer Amador (2016, p. 109). The dispute continues until f. 36 v.

[17] This is made obvious by different phonetic features shared with the Judaeo-Spanish of Thessaloniki which, c. 1815, appear in the manuscript copy of *(Séfer) Sipur maljé haʿotmanŷic* made in the Bulgarian city of Kazanlak, in that area (*vid.* García Moreno y Orfali, 2018, pp. 59-62 and 65-66).

The Silver Age of Sephardic letters: The 19th and 20th centuries

During the nearly three quarters of a century ranging from the last four decades of the 19th century and the first three of the 20th, Sephardic letters flourished anew, thanks to the adoption of new literary genres based on Western European forms—journalism, novels, theatre, and poetry—which were steadily replacing the rabbinical literature which had dominated the language until then (Romero, 1992, p. 177-310).

In linguistic terms, we see conflicting standards (García Moreno, in press) between the traditional model that refused to fade away, and the emerging Neo-romantic models (with French and Italian in the lead), including different attempts at re-hispanisation of the Sephardic language—called *re-castilianization* by Quintana Rodríguez (1999)—that had a relatively slight impact.

In socioeconomic terms, modern trends from different Western schools were steadily becoming established in Turkey and the Balkans, such as the French schools of the Alliance Israélite Universelle, the Italian Dante Alighieri schools, and the Viennese Camondo schools (see Bürki and García Moreno, 2016b, p. 220).

This wide-ranging process of renovation which—as we shall see—had an impact on very different areas of the Sephardic world in the Levant, leading to the appearance of new texts in a revitalised Sephardic language, in which the Sephardim''s economic activities were reflected, and given fresh impetus.

Among the imported literary genres, educational works—popularised by Protestant missionaries who arrived in the Ottoman Empire in the mid-19th century (Romero, 1992, p. 201)—we also find texts dedicated to commerce, such as the two-volume work on business correspondence by Joseph Nehama, *La correspondencia. Libro de cartas diversas y de comercho ... Parte prima* and *El comercho. Parte segunda. Las leis: cuestiones diversas que se atan al comercho* (place unknown, 1906).[18] Commerce and trade, so linked to the Sephardim throughout their history, was now part of the curriculum of the "elevos de las escolas ĵudías de Oriente", the books' intended audience, as we can read on the cover.

In the first volume, pages 37-60 show a series of models of these "Cartas de comercho", business letters ranging from payment orders to acknowledgement of debts to bills of exchange (*letras de cambio* in standard modern Spanish, here called "cambialas", from the It. sing. *cambiale*), as well as different kinds of certificates (see Díaz-Mas and Madrid Álvarez-Piñer, 2014, p. 20). Here is one of these models, a purchase order:

Otro orden

Salonico, (data)

Se. . . .

Trieste

[18] We are following the dating proposed in Díaz-Mas and Madrid Álvarez-Piñer (2014, p. 11), although in the corresponding citation in the *Bibliography of the Hebrew Book* (available online at: http://aleph.nli.org.il:80/F/?func=direct&doc_number=000308735&local_base=MBI01), it is catalogued as: [Sofia, c. 1910]; this is also cited by these authors (Díaz-Mas and Madrid Álvarez-Piñer, 2014, p. 12, n. 4). A digital version of the copies from the Tomás Navarro Tomás Library of the CSIC Centre for Human and Social Sciences of each one of these volumes is available in the collection *Simurg*, *fondos digitalizados del CSIC,* at: http//:simurg.bibliotecas.csic.es.

Uno de mis amigos me hiźo conocer vuestra caśa y me la recomendó de una manera particolar. Esto me engaja a rogarvos de espedirme los artícolos donde toparéš la lista indicativa incluśa a la preśente. Yo renovelaré mis encomiendas si me topo contento de la cualidad y de los precios de la ropa que me emẏiaréš.

Adresad el conoDčimento a la banca de Salonico. Yo versaré el montante al arriḃo de la ropa.

Esperando aviśo de espedición, tengo el honor de saludarvos.

(firma)[19]

The *re-romancisation* of Judaeo-Spanish texts is highly evident, especially in the lexical realm: for example, there are many Italianate neologisms (such as *arriḃo, artícolos, particolar*) and even more Gallicisms (*donde* [a relative pronoun from the Fr. *dont*), *engaja, espedición, montante, renovelaré, versaré*). Even though the lack of Hebrewisms could be explained, in part, by the *non-Jewish* nature of the text, this same explanation does not justify the lack of Turkisms.[20]

The second volume, as indicated in the "Prefación", aims to "dar una idea clara de_las diferentes cuestiones del comercho que se raportan a_la ley. [...] En meldando este chico liḃro, caḍa mercaḍer pueḍrá conocer las principales leis del comercho."[21]

To this end, the volume is divided into ten chapters: I. "El comercio" (pp. 3-5); II. "Las societás" (pp. 5-8); III "Efetos de comercio" (pp. 8-18); IV "Las créḃitas" (pp. 19-25); V. "Las seguritás" (pp. 26-36); VI. "Doganas, posta, telégrafo" (pp. 36-48); VII. "Transporto" (pp. 48-54); VIII. "Ley soḃre el timbro" (pp. 54-56); IX. "Borsa y devdas públicas" (pp. 57-69), and X. "Las bancas" (pp. 69-72).

Although the composition and publication of texts like these shows the healthy state of the marriage between commerce and the Sephardic language at the turn of the 20th century, it is no less true that the growing importance of other languages would, little by little, undermine the foundation not only of that marriage, but of Judaeo-Spanish itself, and the perception that its own speakers had of their language. For example, we need look no further than the volume on business correspondence that we have just examined. Especially symptomatic is a brief footnote under the heading "Chircolares", which opens the aforementioned section on "Cartas de comercho", in which we read: "Ordinariamente, las circulares son rediġidas en lingua franceśa para que ellas puedan ser entendidas de todos los mercaderes de la plaza, ĵidiós o non ĵidiós."[22]

The assumption—up to a certain point, logical—that not all sellers in the market were Sephardic speakers able to understand texts in Judaeo-Spanish that were intended

[19] In Joseph Nehama, *La correspondencia. Liḃro de cartas diversas y de comercho ... Parte prima, s.l.,* 1906, p. 52; see Díaz-Mas and Madrid Álvarez-Piñer (2014, p. 122), using another transcription system.

[20] In spite of all this, the "Léxico *(šoréš)"*, a two-column bilingual vocabulary list at the end of the first volume (pp. 63-64) does include a number of cases in which a Romance neologism is explained by recurring to Turkisms or Hebrewisms, such as: "*intentar – haćer davá*"; "*insistir – meter inad*" and "*dudar – tener safec* (all three on p. 63a); "*novedad – ḥaber*" and "*circuncisión – berit*" (on p. 63b), and *"fatura – cuento, ḥešbón*" and "*procheso – davá*" (on p. 64a).

[21] In Joseph Nehama, El comercho. Parte segunda. Las leis: cuestiones diversas que se atan al comercho*,* p. [2].

[22] In Joseph Nehama, *La Correspondencia,* p. 37, n. 1; see Díaz-Mas and Madrid Álvarez-Piñer (2014, p. 105, n. 54).

for public use, contrasts with the accounts of Spanish travellers from 300 years before seen at the beginning of these pages, and—more importantly—contrasts with the supremacy of French as the global *lingua franca* of the period, in business as well as in other spheres.

But it was not only the French in which the Sephardic intellectual elite was educated that represented a threat to Judaeo-Spanish, whether inside or outside business circles; national languages from the different independent countries emerging from the Ottoman Empire's dismemberment would also play a decisive role in the steady decline of Judaeo-Spanish. Regarding the economic activities of Sephardim, the importance of knowing one of these languages is made manifest—for example—in advertisements and job notices published in the then-new Judaeo-Spanish press.

We can clearly see this in the following advertisement from a famous language teacher, who also had a boarding school:

AVISO

El onorado Sinior Profesor S. Polak lia es konosido an todos moestros Ermanos de el Danubio por su boena metoda y su Pedagogia, y koantos Elevos salieron adelantre que oi biven kon Onor. El Afirmado abaşo da a saver que todo ken gusta de enbiar asus kriaturas en esta Eskola onde que Ambezaran sinko Linguas las koalas: Ebraiko, Şpaniol, Nemsesko, Vlahesco y Fransez.

Se aresiven sus kreaturas Internas kon un pressio konvenivle que seran Boeno miradas.

Todo el ken gusta se poede aderesar ala Redacsion moestra;[23]

Another example is this job advertisement, seeking a multilingual secretary:

Demandan un empiegađo puđiendo haćer la correspondencia en francés y grego. La preferencia seá dađa al que conoce el turco y español,[24]

Yet another example is this advertisement from an accountant seeking work, who highlights his extensive knowledge of the region's languages:

Contable conociendo a fondo el búlgaro, el serbo, el español, y tuviendo nociones de francés, de italiano y de grego, demanda empiego. Muy buenas referencias.[25]

In the case of work for women—who were generally kept outside the public sphere of business, and mainly confined to domestic work, often as caregivers—knowledge of different languages and the possibility of teaching it could also be magnificent selling point, as illustrated by this young Jewish seamstress whose job-seeking advertisement says:

Una hija ĵudía capache en diversos laboros de aguja, y pudiendo dar liciones de grego, demanda un lugar en alguna familla ĵudía. Adresarsen al ĵornal.[26]

---

[23] In *Luzero de la Pasensia,* Turnu-Severin (Romania), no. I/2 (08/12/1885), p. 32. The original Latinate spelling is maintained.

[24] In *La Época,* Thessaloniki, no. XXIX/1428 (26/02/1904), p. 10c.

[25] In *La Época,* Thessaloniki, no. XXXII/1594 (07/06/1907), p. 11c.

[26] In *La Época,* Thessaloniki, no. XXVII/1340 (23/05/1902), p. 3c. In Bürki y García Moreno (2016a, p. 164) there are two more advertisements of this kind, in which knowledge of sewing and languages —in this case, French— is either required or presented as a special skill for the employment of women as a governess and a teacher, respectively.

Aside from the publication of these kinds of advertisements, the Judaeo-Spanish press always had close ties to the economic and commercial circles of the Sephardic bourgeoisie. There were quite a few newspapers that, in their title or (especially) subtitle, clearly showed their interest in economic affairs. Here are some examples from the Ottoman Empire: *La Época. Revista política, comercial y literaria* (Thessaloniki, 1875-1911); *El Avenir. Ĵornal político, comercial y literario* (Thessaloniki, 1897-1916); *El Comercial* (Smyrna, 1906-1908); *La Semana. Ǯurnal político-comercial* (Plovdiv, 1906-1907); *El Paradiśo. Gaćeta política, literaria y comerciala* (Jerusalem, 1909). And the same occurred with the new immigrant communities in the United States with samples like *La América. Ǯurnal ĵudeo-español oriental [...] periódico nacional, literario, político y comercial* (New York, 1911-1924)[27] .

But regardless of whether or not the newspaper's masthead proclaimed the presence of economic and commercial content, the Sephardic press, from its earliest days, provided the latest information on exchange rates (called "Cursos de_las valutas" in *El Correo de Viena*[28] [Vienna, 1869-1884]) and the evolution of prices for certain import-export goods [29] (as we can see in the "Boletino commercial" section of *La Época*).

Moreover, these periodicals also published advertisements for different financial products, such as the following from a company issuing new shares:

> Socieđađ anónima otomana de
>
> navegación en ríos y de irrigación
>
> del Sisurlú (vilayet de Ḥudavendiguiar)
>
> Constituiđa por firmán imperial en data del 27 šaḇá 1320 (26 enero 1904) por un tiempo de 61 años.
>
> Capital social: lir. tur. 110.000 o lir. sterl. 100.000, repreśentađo por 20.000 acciones de capital al portađor, de li. tur. 512, y de lir. ster. 5 cađa una, y 20.000 acciones de dividenda sin deśiñación de valor.
>
> Tođo suscriptor tiene derecho a una acción de dividenda por cađa acción de capital que él suscribe.
>
> Emisión de 13.334 acciones, las 6.666 acciones sien[d]o son atribuiđas a_los asociađos en repreśentación de sus capital metiđo en la masa.
>
> [...][30]

Here is another advertisement for—it appears—a public debt issue, after the line of credit obtained by the then Ottoman Minister of Commerce Mehmed Namık Paşa (1804-1892) from the famous London banking firm of the Rothschilds:

> Empréstimo otomano

[27] We can find a similar phenomenon in an annual publication entitled *Almanac iśraelit 5683. Recoḷḷo de conocencias literarias, históricas, económicas, ĵudías y ĝenerales* (Thessaloniki, 1922).

[28] In *El Correo de Viena,* no. I/5 (01/03/1871), p. 8ab.

[29] In *La Época,* no. VI/263 (27/12/1880), p. 4cd.

[30] In *El Telégrafo,* Constantinople, no. [L]/5 (13/10/1910), p. 4ab.

No hay dinguno que no se guste de la buena noticia que nos truǰeron las gaćetas ingleśas: Namic Pašá contrató con los señores Ročhild de Londra, un empréstimo de 2 miliones y sietecientas mil liras esterlinas. Una partiđa de este empréstimo será metiđo sobre la plaza de Paríś para cađa uno que va recibir acciones a raźón de 6 por cien al año, empezando a contar del primo april, en taxa de 85 por ciento, pagable asegún diremos:

15 por ciento	en afirmando:	
10 “	al primo mayo	
20 “	al “ yunio	
20 “	al “ lulio	
20 “	al “ agosto	

Los intereses son pagables cađa 6 meśes, que es al primo april y al primo octobre, sea a Paríś ande los señores hermanos Ročhild, al cambio fisađo de 25 francos la lira esterlina, sea a Londra ande los señores Ročhild y hiǰo, en liras esterlinas. La paga de la soma entera de dito empréstimo será en tiempo de 15 años.[31]

Insurance companies would also take out advertisements in the local press, as we can see from this Bulgarian medical services firm, in Sofia, offering a “*Suscripción*”:

Se haće saber a todo pađre de famílla que se fondó en muestra civdađ una societađ

La Hermandađ

Esta societad dará a_sus miembros médico y hechuriyas sin ninguna paga en tiempo de premura. Esta societad traerá a sus miembros grandes avantaǰes.

Todo aquel que quere goźar de ansí unos avantaǰes se puede suscribir onde los señores afirmados abaǰo, lo más tadre hasta el 10 april.

Por suscribirse en la societad como miembro, prime que pague 5 levos, los cualos servirán como fondo-capital de la societad.

De el diya que se formará la societad, pagará el miembro 5 levos al mes o 60 levos al año, y por este chico inporto tenerá la derechedađ, después de 3 meśes que se suscribió, de tener médico y hechuriyas gratis de la societađ.

Sofia, 12 marzo 1901.

[...][32]

Of course, publishing periodicals was and is an economic activity in itself, although not always as profitable and appreciated as newspaper editors and journalists would like (Romero, 2007). Moreover, the advertising taken out in the press—besides the examples already shown here—sought and still seeks to promote all kinds of products (from sewing machines to cigarettes, from medicines to shaving razors) and services (of doctors, carriers, restauranteurs, etc.),[33] mainly with commercial intent, whilst also

[31] In *Gaćeta de Costandina. Or Yisrael*, from Constantinople, no. II/5 (27/04/1854) p. 1a-b.

[32] In *El Eco ǰudaïco,* Sofia, no. I/5 (15/03/1901), p. 40bc. The text also includes the names of the six members of a “Provisional Committee”, omitted here.

[33] For a general overview (with examples) of advertising’s impact on the modernisation of Sephardic Jews, see Abrevaya Stein (2003). For tables summarising different goods and services advertised in the Sephardic press, see Bürki (2012, pp. 117-120 and 126-127). For more specific examples of advertising and advertorials (the line between the two is not always clear), see García Moreno (2011b; 2013a; 2013b, pp. 52-54, and in press b); Bürki (2012, pp. 121-126 and 130-135); Bürki y Sánchez (2012); Díaz-Mas

providing revenue for the periodicals themselves (Gieszinger, 2001, p. 2, *apud* Bürki, 2012, p. 116).

Having said this, insofar as these late 19th-century and early 20th-century periodicals represented a kind of catchall encompassing other genres, a kind of *multitext* (Grosse y Seibold, 1996, p. 13, *apud* Bürki, 2006, p. 58) which not only included news, but also literary works, advertorials, etc. ―remember the titles and headings mentioned above―they also drove changes in the cultured norms of Judaeo-Spanish, and served as an ideal vehicle for their dissemination, together with the new imported literary genres. In this dissemination—both of the press itself and of the predominant linguistic standards—trade routes once again played a key role. For example, the Danube became a major driver for spreading linguistic innovation between the Balkans and Central Europe, in both directions (Quintana Rodríguez, 2006, p. 309-310; 2013c, p. 68 and 2013d, p. 219).

In spite of all this, life in the Balkans had become increasingly difficult from the late 19th century onward, and constant wars in this area had ruined trade, which was mostly in Jewish hands, as we have seen. This situation, in the late 19th and early 20th centuries, set off a massive migration of young Sephardim heading for Western Europe—especially France— as well as Africa, the Americas, and Palestine (Romero, 2008, p. 677-678).

As Romero (2008, chapt. 15) sets forth in detail, examples from this time of the traditional Sephardic poetic genre known as the *copla*—which flourished from the 18th to the 20th centuries (Romero, 1992, p. 141-176)—often deal with emigration, as well as other issues of the day, including the endless financial upheaval caused by war, which was the subject of different coplas by the celebrated Yaʿacob Yoná (see Romero, 2008: 574-577).

This wave of migration had a major impact, in the opposite direction, for the future of the Sephardic language and literature in Judaeo-Spanish. This was, for instance, the case in the United States, where new Sephardic-speaking communities sprang up in New York, Seattle, and Los Angeles[34], and with them, new magazines and newspapers;[35] however, the dominance of English and the immigrants' desire to assimilate would, in the end, lead to the steady loss of Judaeo-Spanish. In Latin America, the linguistic proximity between Judaeo-Spanish and the American varieties of Spanish—including variants spoken in some US states—offered fresh opportunities to the immigrants, as made explicit in different articles appearing in the Sephardic press on both sides of the Atlantic (see Romero, 2008, p. 701), such as this one that appeared in *La América* of New York:

> Y si estos ss. pensan haćermos bien a_cavśa de la lingua, les dećimos que nuestros ĵudiós haƀlantes solo el español, si encontran dificultad en sus emigrar en América a_cavśa de la

(2013); Romero and García Moreno (2013, pp. 130-134), Bürki and García Moreno (2016a y b), and García Moreno and Mancheva (2019).

[34] In some cases, members of a new community mainly came from the same Mediterranean enclave, such as in Los Angeles, where many were originally from Rhodes (Díaz-Mas and Sánchez Pérez, 2012, pp. 153-156), and it was the same in South America, in such places as Temuco (Chile), where most Sephardics came from Monastir (now Bitola, in Macedonia).

[35] Examples of the Judaeo-Spanish press in the USA include such New York newspapers as *La América* (1910-1925); *El Progreso* (1915) ―which soon changed its name to *La Ḳoẓ del Pueblo~La Bos del Pueblo* (1916-1919), and in its last year was called *La Época de Nu Yorc~La Época de New York* (1919)―, and *La Luź~The Light* (1921-1922). Los Angeles, for its part, had *El Mesaĵero~The Messenger* (1933-1935).

> lingua, ellos ya están topando el remedio de emigrar ande se haƀla la lingua española como Cuba, Texas y otros estados unidos ande se haƀla el español, ansí que en Panamá, México, Perú, Chile, Braśil, Arġentina, etç. en la América del Sud,[36]

However, this same linguistic proximity led to the loss of a distinctive variety of Judaeo-Spanish within the Spanish-speaking world at large (Hassán, 1995, p. 124 and 131).

The death throes of Judaeo-Spanish in the 20th and 21st centuries

There a number of factors—some of which we have already mentioned—that led to the current situation, in which we are seeing the death throes of Judaeo-Spanish.[37] Over the course of history, the bilingualism—or even multilingualism—of the Sephardic cultural elites was, as we have seen, a tool for their social and economic progress; however, in the end it led the speakers themselves to undervalue the language that had been traditionally associated with the identity of the Sephardic nation: Judaeo-Spanish. Also contributing to this was the rise of national languages in the new states that rose out of the breakup of the Ottoman Empire, including Turkish in the Republic of Turkey, or Modern Hebrew in the State of Israel, after it was founded in 1948.

In any case, pressure from other languages does not, by itself, explain the demise of the Sephardic language. Although they lacked the support of modern mechanisms that favour standardisation (e.g citizenship, educational system, compulsory military service) these languages—or many of them—had always been there, modelling Judaeo-Spanish in certain areas, but without undermining its status as the language of Sephardic communities.

As we have noted above, Judaeo-Spanish represented, for centuries, a powerful unifying element for a network of Sephardic communities scattered throughout the eastern Mediterranean and the Balkans, favouring cultural and commercial exchanges among them. With the disappearance of many of these communities, their language ties, so important in the past, became—it goes without saying—unnecessary. This disappearance happened in very different ways. Especially dramatic was the case of the many communities such as that of Thessaloniki, which is sadly famous for having suffered—along with others in Greece, Romania, and the former Yugoslavia—the Nazi extermination during World War II, with the consequent drastic reduction in the number of Judaeo-Spanish speakers. However, as noted previously, linguistic assimilation—whether in historic Sephardic enclaves (such as Bulgaria or Turkey) or the new promised lands of Western Europe, the Americas, and Israel—also led to the disappearance of major language communities.

Taking everything into account, it must be understood that it was precisely the lack of any clear utility in preserving Judaeo-Spanish (or need to do so) that, in recent decades, led to the current situation: a slow but steady process ending in its almost complete disappearance as a living language.

---

[36] In *La América* (Nueva York), V/205 (25/06/1915), p. 5b.

[37] Regarding Judaeo-Spanish's process of dying, see the essential work by Harris (1994).

Bibliography

ABREVAYA STEIN, Sarah (2003). *Making Jews Modern. The Yiddish and Ladino Press in the Russian and Ottoman Empires*. Bloomington (Ind.), Indiana University Press.

ARIZA, Manuel (2015). "Documentos judeoespañoles de Pisa de la segunda mitad del siglo XVII. Primera aproximación", in GARCÍA MARTÍN, José María and BASTARDÍN CANDÓN, Teresa (eds.). *Actas del IX Congreso Internacional de Historia de la Lengua Española* (Cadiz, 2012). Madrid-Frankfurt, Iberoamericana Vervuert, 2015, vol. II. pp. 1731-1742.

BENAIM, Annette (2012). *Sixteenth-Century Judeo-Spanish Testimonies. An Edition of Eighty-four Testimonies from the Sephardic Responsa in the Ottoman Empire*. Leiden, Brill.

BERENGUER AMADOR, Ángel (2016). *Edición y caracterización lingüística del libro sefardí "La güerta de oro" de David M. Atías* (Livorno, 1778). Doctoral thesis. Universidad Complutense de Madrid (available at: http://eprints.ucm.es/39941/1/T37947.pdf).

BUNIS, David M. (1982). "Types of Nonregional Variation in Early Modern Eastern Spoken Judezmo", *International Journal of the Sociology of Language,* 37, pp. 41-70.

BÜRKI, Yvette (2006). "El discurso periodístico de la prensa judeoespañola del siglo XIX", *Revista Internacional de Lingüística Iberoamericana,* IV:2, pp. 53-76.

— (2012). "La publicidad en los periódicos salonicenses *La Época* y *El Avenir* en los albores del siglo XX", in BÜRKI, Yvette; CIMELI, Manuela, and SÁNCHEZ, Rosa (eds.). *Lengua, Llengua, Llingua, Lingua, Langue. Encuentros filológicos (ibero)románicos. Homenaje a la profesora Beatrice Schmid.* Múnich, Peniope, pp. 115-136.

— and GARCÍA MORENO, Aitor (2016a). "Mujer y publicidad", in DÍAZ-MAS, Paloma y MARTÍN ORTEGA, Elisa (eds.). *Mujeres sefardíes lectoras y escritoras (siglos XIX-XXI)*. Madrid, Iberoamericana Vervuert, Col. *Tiempo emulado*. *Historia de América y España*, 49, pp. 147-178.

— and GARCÍA MORENO, Aitor (2016b). "Postura y reflejos socioculturales en la publicidad sefardí de la primera mitad del siglo XX", in BÜRKI, Yvette and PARTZSCH, Henriette (eds.). *Redes de comunicación: la prensa en el mundo hispánico*, Berlín, Frank & Timme, pp. 213-248.

— and SÁNCHEZ, Rosa (2012). "'En el mundo del fumar'. Cigaricos en *La Vara* de Nueva York", in GARCÍA MORENO, Aitor (ed.). *Homenaje a Elena Romero*. Special edition of *eHumanista,* 20, pp. 98-126.

CORHIJE (Corpus Histórico Judeoespañol). GARCÍA MORENO, Aitor and PUEYO MENA Francisco Javier (2013-). Corpus online, at: http://esefardic.es/corhije.

CUADROS, Roberto (2016). "El ¿(judeo)español? de Pisa a la luz de cuatro inventarios de finales del siglo XVII", *Sefarad*, 76:2, pp. 397-453.

DÍAZ-MAS, Paloma (2013). "Annonces publicitaires dans les écrits séfarades (1880-1930)", en ROUISSI, Soufiane y STULIC-ETCHEVERS, Ana (eds.). *Recensement, analyse et traitement numérique des sources écrites pour les études séfarades*. Bordeaux, Presses Universitaires de Bordeaux, pp. 171-210.

— and MADRID ÁLVAREZ-PIÑER, Teresa (2014). *Cartas sefardíes de Salónica: La Korespondensya (1906).* Barcelona. Tirocinio.

— and SÁNCHEZ PÉREZ, María (2012). "La comunidad sefardí de Los Ángeles (California) y su periódico El Mesajero/The Messenger", in GARCÍA MORENO, Aitor. *Homenaje a Elena Romero*. Special edition of *eHumanista,* 20, pp. 153-171.

GARCÍA MORENO, Aitor (2004). *Relatos del pueblo ladinán:* Me'am lo'eź *de* Éxodo, Madrid, CSIC.

— (2010). *El judeoespañol II: 2nd: características*. Online publication, part of the *Biblioteca E-Excellence* collection at www.liceus.com.

— (2011a). "Towards a New Style in Nineteenth Century Judeo-Spanish Prose: Two Judeo-Spanish Versions of the German Novel *Der Rabbi und der Minister*", *European Judaism,* 44:1, pp. 9-21.

— (2011b). "La recepción de la medicina moderna entre los sefardíes de Oriente", in MORENO KOCH, Yolanda (ed.). *De cuerpos y almas en el judaísmo hispanomedieval: entre la ciencia médica y la magia sanadora*. Cuenca, University of Castilla-La Mancha, pp. 255-286.

— (2013a). "Programa doble con suplemento: la cartelera en la prensa sefardí de Estambul, años 30", *MEAH: sección de hebreo*, 62, pp. 57-82.

— (2013b). "Juegos de palabras, palabras de *El Juguetón*", in ŞAUL, Mahir (ed.). *Istanbul.* 37-59.

— (2013c). "The spread of the German (?) calque *ansí un...* (Eng. *'such a...'*) in Judeo-Spanish", in AYALA, Amor; DENZ, Rebekka; SALZER, Dorothea, and VON SCHMÄDEL, Stephanie (eds.). *Galut Sepharad in Aschkenas: Sepharden im deutschsprachigen Kulturraum.* In the magazine *PaRDeS: Zeitschrift der Vereinigung für Jüdische Studien e.V.,* 19, pp. 57-68.

— (2013d). "Río abajo, tiempo después: diferencias léxicas en dos versiones sefardíes danubianas (Viena 1877 y Belgrado 1906) de la novela alemana *Der Rabbi und der Minister"*, in STUDEMUND-HALEVY, Michael (ed.). *Sefarad an der Donau*. Barcelona, Tirocinio, pp. 205-221.

— (2015). "Historia de la lengua sefardí: el caso de las oraciones de relativo", in TAVIM, J. A. *et al. In the Iberian Peninsula and Beyond: A History of Jews and Muslims (15th-17th Centuries),* Newcastle, Cambridge Scholars Publishing, vol. II. pp. 149-164.

— (in press, *a*). "Contienda de normas en el judeoespañol escrito del siglo XIX", in SÁNCHEZ MÉNDEZ, Juan Pedro y BUSTOS GISBERT, Eugenio de. *La configuración histórica de las normas del castellano*, Valencia, Tirant Lo Blanch.

— (in press, *b*). "Publicidad ¿no comercial? en la prensa sefardí de finales del siglo XIX y primeras décadas del XX", in YILDIZ, Efrem and MUÑOZ SOLLA, Ricardo (eds.). *Homenaje a Carlos Carrete Parrondo*, Salamanca, Ediciones Universidad de Salamanca.

— and Dora MANCHEVA (2019). "Eating and Drinking among Bulgarian Sephardim at the Turn of 20th Century", in KATNY, Andrej, OLSZEWSKA, Izabela & TWARDOWSKA, Aleksandra (eds.), *Ashkenazim and Sephardim: Language Miscellanea*, Berlin, Peter Lang, pp. 65-87,

— and Moisés ORFALI (2018). *La saga de los reyes otomanos. Edición crítica y estudio de tres versiones sefardíes del* Séfer Sipur maljé ʻotmanlim *(Constantinopla 1767 y 1863, y Kazanlak 1815)*. Granada, Ediciones Universidad de Granada.

GELBER, Nathan Michael (1948). "The Sephardic Community in Vienna", *Jewish Social Studies,* 10:4, pp. 359-396.

GIESZINGER, Sabine (2001). *The History of Advertisement Language. The Advertisements in "The Times" from 1788 to 1996*. Berne, Peter Lang.

GROSSE, Ernst Ulrich and SEIBOLD, Ernst (eds.) (1996[2]). *Panorama de la presse parisienne. Histoire et actualité, genres et languages*. Fráncfort del Meno, Peter Lang.

HARRIS, Tracy K. (1994). *Death of a Language. The History of Judeo-Spanish.* Newark-London-Toronto, University of Delaware Press & Associated University Presses.

HASSÁN, Iacob M. (1995). "El español sefardí (judeoespañol, ladino)" in SECO, Manuel and SALVADOR, Gregorio (eds.). *La lengua española hoy*. Madrid, Fundación Juan March, pp. 117-140.

KAHANE, Henry; KAHANE, Renée, and TIETZE, Andreas (1958). *The Lingua Franca in the Levant: Turkish Nautical Terms of Italian and Greek Origin.* Urbana, University of Illinois Press.

MINERVINI, Laura (1994). "*Llevaron de acá nuestra lengua*... Gli usi linguistici degli ebrei Spagnoli in Italia", *Medioevo Romanzo,* XIX, pp. 134-192.

— (2008). "Formación de la lengua sefardí", in HASSÁN, Iacob M.; IZQUIERDO BENITO, Ricardo, and ROMERO, Elena (eds.). *Sefardíes: lengua y literatura de una nación dispersa*. Cuenca, Universidad de Castilla-La Mancha, pp. 25-49.

QUINTANA RODRÍGUEZ, Aldina (1999). "Proceso de recastellanización del Judesmo", in TARGARONA BORRÁS, Judit and SÁEZ-BADILLOS, Ángel (eds.). Jewish Studies at *the Turn of the 20th Century: Proceedings of the 6th EAJS Congress, Toledo, 1998.* Leiden-Boston-Cologne, Brill, vol. II. pp. 593-602.

— (2006). *Geografía lingüística del judeoespañol.* Berne, Peter Lang.

ROMERO, Elena (1992). *La creación literaria en lengua sefardí,* Madrid, Mapfre.

— (2007). "La prensa judeoespañola contra los recelos, la burocracia y la censura", in MARTÍN ASUERO, Pablo and GERSON ŞAARHON, Karen (eds.). *Ayer y hoy de la prensa en judeoespañol*. Istanbul, Isis, pp. 9-35.

— (2008). *Entre dos (o más) fuegos. Fuentes poéticas para la historia de los sefardíes de los Balcanes*. Madrid, CSIC.

— and GARCÍA MORENO, Aitor (2013). "Del *narguilé* a los cigarrillos: un ejemplo de la modernización del mundo sefardí de los Balcanes", in VAROL, Marie-Christine and SÁNCHEZ, Rosa (eds.). *La presse judéo-espagnole, support et vecteur de la modernité*. Istanbul, Libra, pp. 113-142.

SCHMID, Beatrice (2008). "La lengua sefardí en su plenitud", in HASSÁN, Iacob M.; IZQUIERDO BENITO, Ricardo, and ROMERO, Elena (eds.). *Sefardíes: Lengua y literatura de una nación dispersa*, Cuenca, Universidad de Castilla-La Mancha, pp. 51-79.

Haketia, Spanish, and Spanish-Moroccan commercial relations

Israel GARZÓN

Haketia is the name of the dialect specific to the Jews from the Iberian Peninsula who settled in Morocco after their expulsion from Spain and Portugal; it is quite distinct from standard Spanish, Ladino, and the vernacular Judeo-Spanish of the Eastern Sephardim. It comprises a form of Spanish that evolved differently from that spoken in peninsular Spain, with significant contributions from Arabic and Hebrew and, to a much lesser extent, from other languages. This Spanish dialect belonged to the Jewish populations of the cities of northern Morocco, of Ceuta and Melilla, and of the communities that sprang up outside Morocco due to the emigration of these populations, such as those of Gibraltar and Oran.

The word *Haketia* was probably formed, like many others of that dialect, from an Arabic root and a Spanish ending. The most likely origin of *Haketia* is the Arabic verb *ḥaka* (converse, speak, say, narrate). And this root is very fitting, as the term serves to designate the conversational Judaeo-Spanish language of the Sephardic Jews of Northern Morocco.

There is not the slightest doubt that medieval Spanish-speaking Jews used specific vocabulary deriving from two needs:

1. The first, the translation of their sacred texts—the Torah, the Books of the Prophets and the Biblical texts—into medieval Spanish. Due to the nature of these texts, they had to be translated word for word, i.e. calqued from Hebrew. This literal translation gave rise to the medieval renditions of the Bible into Romance languages.

2. The second, the inclusion of Hebrew words to refer to phenomena that did not exist in Spanish: Jewish holy days, rites of passage specific to Judaism, Jewish liturgical objects, prayers, months of the year, festive meals, ritualized expressions, etc.

After Jews were expelled from the Iberian Peninsula, between 1492 and 1498, the populations that settled in Morocco and in the Ottoman Empire encountered—on reaching these places of refuge—Jewish communities which spoke other languages (the Romaniote Jews in the Eastern Mediterranean, the Jews of the Nasrid Kingdom in Northern Morocco, and the native Jews, the *Toshabim,* in the rest of the Kingdom), with which they sometimes merged. This explains part of the incorporation of other languages into the Sephardic dialects (Turkish and Greek in Eastern Judaeo-Spanish and Arabic in the Judaeo-Spanish language of Morocco).

That the banished Jews continued to use their own language and did not adopt that of the host communities was due, primarily, to a certain elitism, as they considered themselves more advanced than the native Jews. In addition, there were differences between the two communities; for example, since the 13th century the Hispanic Jews

had accepted the rule of monogamy instituted by Rabbeinu Gershom, while the native Jews of Morocco, who lived in a predominantly Muslim society, maintained their polygamous practices. Another difference between the two communities was that the Spanish Jews upheld inheritance laws for women that were more favourable than those of the native Jews.

The dominant grammatical system of Haketia is that of Spanish, which is also the source of most of its terms. This is evident in the verb forms and in the plural and feminine forms of nouns and adjectives. But other languages also had an influence:

1. Liturgical Ladino, used by Spanish-Moroccan Jews for the "Spanish" reading of sacred texts, contributed, for its part, towards the conservation of numerous Hispanic archaisms.

2. The above notwithstanding, Arabic and Hebrew were the two major sources from which Haketia was to draw those terms whose Spanish forms were gradually forgotten, as well as those required to serve as synonyms or to designate ethno-cultural specificities. The natural sounds of these languages were maintained in the importation of these words, contrary to what has happened to Arabic words incorporated into standard Spanish, which have been stripped of their original physiognomy. For example, the Spanish words *alhelí* (gillyflower) and *albahaca* (basil) are rendered as *hailí* and *alhabaka* in Haketia.

Terms of Arabic origin generally designated everyday objects or actions, whereas Hebrew terms referred to concepts or ritual objects, ceremonies, or courtesies. Use of the former was almost entirely avoided in written or formal verbal registers, including both community and religious registers (*derushim* or ceremonial speeches given at *bar mitzvahs* or upon a person's death), which present a more pristine Spanish, albeit peppered with Hebraisms.

The verb endings of the Semitic terms were Hispanicized to *-ar* and *-ear,* which acted as true verbal Hispanicizers. Plurals were Hispanicized to end in *-s,* and gendered words in *-o* and *–a.* The Semitic terms also underwent other phonetic changes, such as replacing *sh* with *s,* for example in *kiddush,* which became *kiddús,* and in *shabbat,* transformed into *sabbat* (and sometimes *sabbá*).

Furthermore, a certain tendency towards regular verb endings was achieved by substituting the third conjugation endings of irregular verbs with the third conjugation endings of regular verbs. Thus, *pedir* (to ask) became *pider, medir* (to measure) became *mider,* and so on.

In addition to the basic sounds of medieval Spanish (some of which have been lost from contemporary Spanish), the phonetics of Haketia included sounds deriving from Semitic languages that did not exist in medieval Spanish, primarily the Hebrew phonemes *hé*, *vav, zain, het, shin* and *ayin,* and the Arabic phonemes *qof* and *gain*, as well as the Semitic emphatic consonants.

All of the sounds of contemporary Spanish (with the Andalusian-style "s" sound, or *seseo,* for the *c* and the *z* and some *x's*) were incorporated into the phonetics of Haketia during the 19th and 20th centuries, until this dialect was abandoned by the current generations of Spanish-Moroccans.

To conclude this brief analysis of the language,[38] it should be noted that until well into the 20th century the Spanish-Moroccan Jews used this dialect amongst themselves, as well as in their contact with Spaniards, in addition to possessing a rich cultural heritage—of courtesies, refrains, stories, liturgical and secular poems, and numerous *romances* (ballads)— in Haketia. Much of this heritage is being kept alive by families of this origin, who also continue to partially use this dialect in intra-family exchanges.

Impact of Haketia on Spanish-Jewish and Spanish-Moroccan relations

Since first establishing relations with Morocco at the end of the 18th century, the Spanish very quickly grasped the benefits of having—in the country's Jewish population—a group which, due to the similarity of its language and to its commercial and entrepreneurial propensities, could assist them as translators in their relations with the Arabs, and also as commercial agents, or even as lower-level consular officers. Soon, many Jews began to work as translators for the Spanish legations, and some particularly prominent figures became their commercial agents at the busiest ports, such as that of Mogador Island (Essaouira).

As relations between Spain and Morocco intensified, some Jews became Spanish vice-consuls. From 1837, if not earlier, the Spanish Government employed Moroccan Jews, primarily of Spanish origin, as consular officers. In 1837, Spain awarded the position of vice-consul in Tangiers to a Sephardi, Jacobo Colombano, who served continuously until 1841. In 1843-1844, in Mogador, Spain once again entrusted consular responsibilities to a Jew, Víctor Darmon. The vice-consul in Larache in 1859 was also Jewish.[39] For 14 years, Joseph Benatar served as Spain's vice-consul in Rabat-Casablanca, until 1859, when he was evacuated due to the Hispano-Moroccan War[40]. Abraham Hassan was a consular officer in Tetuán for many years. Fernando Azancot was Spain's vice-consul in Casablanca until his death in 1876.

On 3 November 1877, when the Bourbon Restoration was in full swing, and under the conservative policies of Cánovas del Castillo, a Royal Order was issued by the Minister of State to the Minister Plenipotentiary in Tangier decreeing that non-Spanish nationals could no longer be appointed as consuls and vice-consuls, as they had been in Morocco until that time; the Order strictly stipulated that from thenceforth "no individual who is not a true Spanish subject shall be appointed vice-consul, or consular officer".[41]

Furthermore, as the European nations' *protégé* system extended throughout the country, a relatively high number of Spanish-Moroccan Jews entered under Spanish protection. This protection was primarily extended not to the personnel of the consulates and vice-consulates (translators and vice-consuls), but to the commercial agents (*semsars*) and agrarian associates (*mukhalatas*). Whereas the latter were largely Muslims, the former were mostly Jews.

---

[38] Those seeking further information on the dialect may analyse the work of Jacobo Israel Garzón *Lengua y literatura oral del judeo-español de Marruecos o jaquetía,* Madrid, Hebraica Ediciones, 2017.

[39] See *La Corona,* 24/09/1859, p. 6.

[40] See *El Mallorquín,* Palma de Mallorca, 12/11/1859, p. 1, and the letter of Menahem Nahón dated 10 November 1859 in *L'Univers Israélite,* December 1859.

[41] Royal Order of the Ministry of State to the Plenipotentiary Minister of His Majesty in Tangiers, Protections, 3 November 1877 (Caja 81/48, Fondo 15, AGA) [Box 81/48, Repository 15, General Archive of the Administration). Source: Ojeda Mata.

The situation was consolidated after the Hispano-Moroccan War (1859-1860) and the occupation of Tetuán by Spanish troops until 1862. Contact with the Jewish community was intensified, and soon they assumed a role supporting the Spanish army, as reported by the Spanish war correspondents.

As demonstrated by a number of historians, such as Isabelle Rohr and Maite Ojeda Mata, this Spanish policy, in addition to being useful for Spanish-Moroccan trade, counterbalanced the French dominance over the Jewish population, redirecting them towards Spain, even though this was achieved primarily in the north of the country, home to the vast majority of Spanish-Moroccan Jews in the 19th century.

This Spanish policy further expanded the protégé system, leading in many cases to Spanish naturalization. Naturalization was usually aimed at the mercantile Jewish elites, as well as at educated middle-class Jews, who were recruited to undertake consular functions.

In addition to the names mentioned above, Ojeda Mata[42] provides us with the names and surnames of Spanish-Moroccan Jews naturalized by virtue of Naturalization Certificates, primarily between Spain's Glorious Revolution (1869) and the Madrid Conference of 1880:[43]

1869 David Cohen

1871 Abraham Bendrao, Juda Ovadia Benzuyan, Aharon Ovadia Edery, Menohen Ovadia Edery, Josef Ovadia Edery, Mordojay Ovadia Edery, Semtob Benchinol Levi, Abraham Aserad Mengualid, Josef Salama Rofé, Jacob Salama Rofé, Ruben Bentlina, Abraham Benmiara, José Moial, Moisés Hernas, Samuel Barchiloa, Samuel Benmiara

1873 Abraham Benasaya

1875 Sadia de Abraham Cohen

1876 Lillaó Bensaquen y Bensaquen

1878 Judah Benliza Benshetrit, Moisés Toby Serfaty

1879 Jacob and Salomon Bendahan

Between the Madrid Conference of 1880 and the end of the Regency of Queen Maria Cristina when her son, Alfonso XIII, came of age, only four individuals were granted Spanish nationality by virtue of a Naturalization Certificate: David de Abraham Benón in 1891; David Melvi Lugmany in 1892; Alberto Bandelac Bentata in 1899, and Samuel Mobily and Leon de Guitta in 1900.

The aforementioned cases were entirely different to those in which Spanish nationality was granted due to place of residence, which was in general conditional upon the individual living in peninsular Spain, the Canary Islands, or places over which

[42] Maite Ojeda Mata, *Protección y naturalización española de judíos en el marruecos colonial*, in *Los judíos en Ceuta, el norte de África y el estrecho de Gibraltar. XVI Jornadas de Historia de Ceuta.* Ceuta, IEC, 2014, pp. 277-301.

[43] There are linguistic errors in the transcriptions of Spanish-Moroccan Jewish surnames, but they were recorded with these errors in the Official Madrid Gazette.

Spain had sovereignty, such as Ceuta or Melilla;[44] similarly, they differed from those cases in which nationality was granted due to the applicant's merits.[45]

In 1884, four years after the Madrid Conference of 1880 and 20 years before Pulido "discovered" the Eastern Sephardim, Joaquín Costa, in the *Revista de Geografía Comercial,* reaffirmed Spain's commercial interest in the Spanish Jews of Morocco, and also in the Sephardim of the Eastern Mediterranean, for the purpose of trade with the Ottoman Empire.

It should not be forgotten that Spain's role in Morocco at the end of the 19th century was supported by the Jewish press in Tangiers. With the collaboration of two Tangerian Jews, Isaac Toledano and Isaac Laredo, and the Gibraltarian Agustín Lugaro, Tangiers' second-largest printing house and fifth newspaper, *El Eco Mauritano,* were inaugurated in 1886. This Spanish-language newspaper was published on Wednesdays and Saturdays. Menahem Attías and Mesod Benitah both wrote for the newspaper, as did Isaac Laredo. From 1889 until 1894, Tangiers also had the *Diario de Tánger*, for which Pinhas Assayag[46], the correspondent of several Madrid daily newspapers, wrote under the pseudonym Veritas. In 1893, David Shriqui, Isaac Laredo, and Leopoldo Onetto founded another daily newspaper, *La Crónica,* which was subtitled "Defender of the international and local interests of the Empire of Morocco". Shriqui and Laredo both wrote for the newspaper, as did Moses Marrache. Spain continued to directly defend Spanish interests in the region, subsidizing a new daily newspaper, *El Porvenir* (continued, as of 1938, by the daily newspaper *España*), to which a number of Jews from Tangiers, such as Abergel and Mesod Benitah, also contributed.

It is nevertheless a fact that there was no narrative regarding the "shared identity" of Spaniards and Sephardim until Pulido's campaign, begun in 1904, which largely concerned Spanish-Moroccan Jews. This "shared identity" had its roots in language rather than ethnicity.

Following the restrictions placed on protection and nationalization in 1880, there was a fresh upsurge at the beginning of Alfonso XIII's reign, when preparations were underway to establish the Protectorate. While the number of protections fell, nationalizations increased until 1912, the date on which the Protectorate was established, with over 40 individuals granted Spanish nationality during the period from 1903 to 1912.

From that date on, although a large number of peninsular Spaniards settled in the Protectorate and in the Tangiers region, the Jewish community's role, both as regards commercial relations with Spain and the expansions planned by the Spanish in the main cities (Tetuán, Melilla, Larache, Alcazarquivir and Arcila), was essential for trade and for Spanish interests, despite the decline in the number of naturalizations (20 during the period from 1912 to 1931). In the absence of any exact figures, it is reasonable to think that this number increased under the Second Republic and decreased substantially under Franco (from 1936 to 1956).

---

[44] These cases are not included in this article, because they were linked to a Spanish residence.

[45] Such is the case of Mesod Ben Avram Amselem, interpreter and protégé of Spain's Legation in Larache from 1890, a "wholesale merchant in wool, leather and cereals" and "one of the best Jews on the square" (according to the Plenipotentiary Minister of Spain in Tangier, who granted him Spanish nationality in 1900).

[46] Pinhas Assayag was a correspondent for several Madrid daily newspapers, including *El Imparcial*, *Patria*, *El Liberal* and *El Heraldo de Madrid.*

When Spain ended the Protectorate in 1956, the Spanish-Moroccan Jewish community, which continued using Haketia in the home and standard Spanish as a social language, began a diaspora during which, over a period of 25 years, 30-35% of them moved to Spain, while 25-30% emigrated to Hispano-American countries (primarily Venezuela) and the rest headed to Israel or, to a much lesser extent, to Canada or France.

Thus ended a cycle in which Spanish-Jewish relations had enormously benefited both Spain and the Spanish-Moroccan Jews.

However, its closure marked the opening of another cycle, which Spain has yet to fully exploit—that of the new Spanish-Moroccan Jewish diaspora beyond our borders, primarily to Israel and Canada.

The endurance of Spanish in the Maghreb

David FERNÁNDEZ VÍTORES
University of Alcalá
Member of the Public Service Translation and Interpreting Training and Research Group (FITISPos)

1. Introduction

The formation of commercial, political and cooperation ties between Spain and the various countries of the Maghreb region has afforded the Spanish language a presence, albeit a modest one, in nations such as Algeria, Tunisia, Libya and even Mauritania. In the case of Algeria, Spanish is also spoken as a second language by Sahrawi refugees settled in the province of Tindouf. However, for clear historical reasons, the country in which Spanish is most notably present is undoubtedly the Kingdom of Morocco.

Of the Maghreb countries, Morocco's linguistic situation is also one of the most complex (Leclerc, 2013). The arrival of the Arabs in the 7th and 8th centuries to then Berber-speaking North Africa, combined with French and Spanish colonization in the early 20th century, has shaped a linguistic landscape in which a number of languages—each with their assigned and often antagonistic roles—exist side by side but in very different situations (Ennaji, 2002: 71-72).

As a consequence of this history, in modern Morocco it is almost impossible to find spheres in which a single language is used. Most frequently, one encounters situations in which two, three or more languages compete to establish niches in Morocco's "linguistic marketplace"[47]. The vitality of this "linguistic marketplace" is demonstrated by the constitutional reform of July 2011, in response to the Arab Spring protests. Since that date, Morocco has had two official languages: Modern Standard Arabic and the Amazigh language, also known as Berber.[48] Nevertheless, the new constitution states that Amazigh shall be introduced at the official level gradually. Therefore, in practice, Arabic remains the most widely used language in the public sphere, although the constitution provides that Amazigh will be present in the same areas that Arabic currently occupies. Until that happens, the most socially prestigious languages will be Modern Arabic and French, the latter with the status of a second language.

In this context, Spanish is one of the foreign languages that currently form part of Morocco's linguistic landscape. Although, like French, it is a colonial language, its presence is much smaller. However, Spain's geographical proximity to Morocco, and the history shared by Spain and the Alaouite kingdom, have placed Spanish in a special position in Moroccan society.

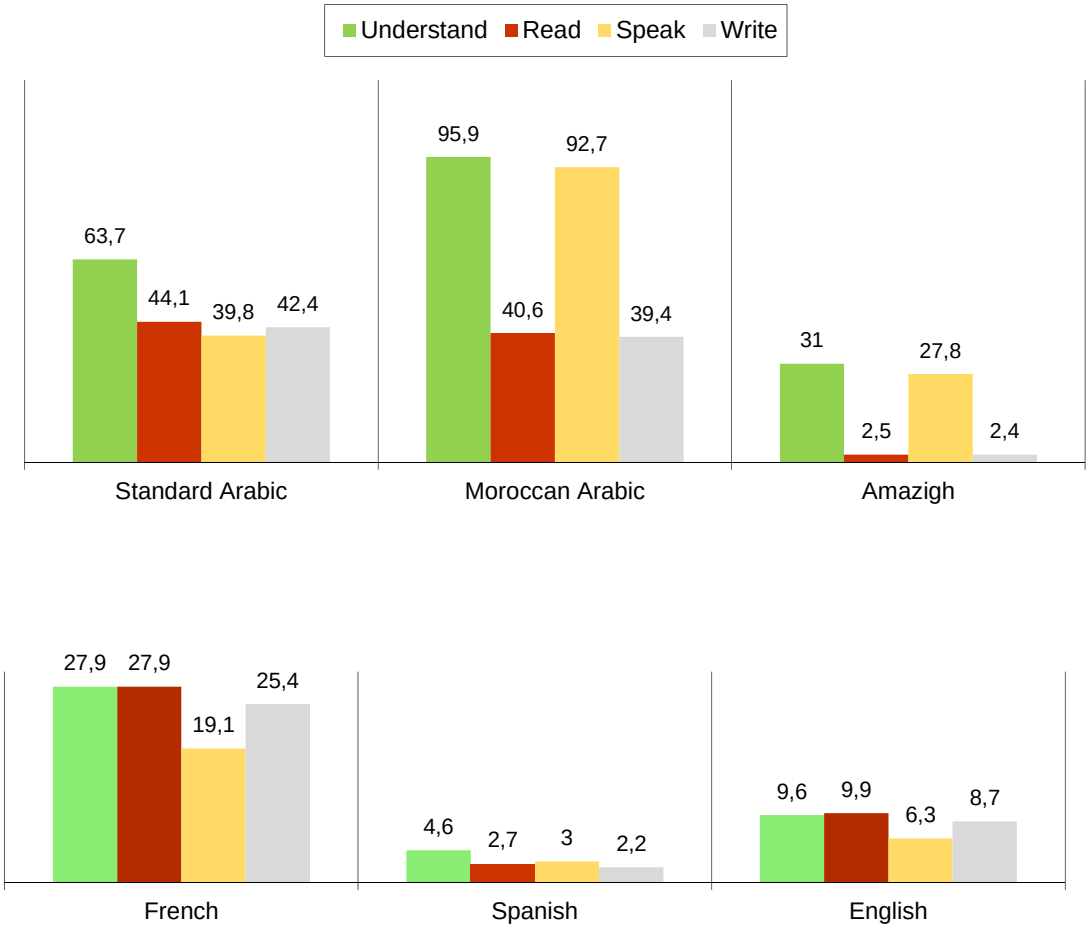
[47] According to the concept of linguistic marketplace proposed by Pierre Bourdieu (1985 [1982]: 13).
[48] See Article 5 of the Moroccan Constitution, *Official Bulletin of the Kingdom of Morocco, no. 5964, of 30 July 2011.*

2. Spanish speakers

Determining the exact number of Spanish speakers is no easy task. Although certain studies have placed the percentage of the Moroccan population with a knowledge of Spanish at as much as 21.9%,[49] the most exhaustive survey published to date, performed in June 2012 by the Royal Institute for Strategic Studies (IRES), with a sample of 5,046 people, put the maximum penetration rate of Spanish at 4.6%. Based on the United Nations' population forecasts for 2018,[50] 1,664,823 Moroccans can understand Spanish, although only slightly more than a million can speak Spanish: 1,085,754. According to the forecasts, 977,178 Moroccans can read Spanish, and 796,219 can write in Spanish. The contrast between, on the one hand, the number of Moroccans who claim to understand spoken Spanish, or to speak Spanish, and, on the other hand, those who claim to be able to read or write Spanish suggests that the language is primarily acquired orally.

Chart 1

RESPONSE TO THE QUESTION: "OF THE FOLLOWING LANGUAGES, WHICH CAN YOU…?" (AS A %)



Source: Benjelloun (2012: 11).

[49] In 2005, the Barcelona Centre for International Affairs (CIDOB).

[50] UN estimates put the population of Morocco in 2018 at 36,191,805 people. Consulted on 15 November 2017.

As shown, Moroccan Arabic is the language that is most widely used by Moroccans. Of the foreign languages, French is undoubtedly the most widely known, followed by English. Nonetheless, this knowledge does not appear to be as widespread as suggested by prior surveys. The situation is similar for Spanish, which, judging by the small "market share" the survey gives the language, seems to have lost a large number of speakers compared with the results of previous consultations.

Most of these Spanish speakers are concentrated in the north of the country, largely due to Spain's former colonial presence in the region and its greater proximity to the Iberian Peninsula. The regions where the largest proportions of people are able to speak Spanish are Al Hoceima, in the area of the former Protectorate, Tangier and Laayoune, one of the three regions into which the Spanish Sahara was divided after the Moroccan administration was established (Gil Pedromingo and Otero Roth, 2008). The presence of Spanish is particularly significant in the regions close to Ceuta and Melilla, whose area of linguistic influence extends from the port of Tangier to Nador, where a high percentage of people speak Spanish (Moustaoui, 2006: 21).

Although French is the foreign language *par excellence*—and has semi-official status—in the north of Morocco Spanish may be considered a second language for many of those who speak it. In fact, in most cases Spanish is acquired informally, i.e. outside the classroom, confirming the language's existence as part of the local sociolinguistic panorama. Furthermore, irrespective of speakers' fluency in Spanish, they use the language passively, by watching Spanish television, or actively, by interacting with Spaniards who still live in the area, or even with tourists (Sayahi, 2005: 202). Additionally, Spanish companies that operate in the region use Spanish as their working language (ibid.), thus encouraging Spanish speakers to maintain their level of fluency in the language or to improve it, as a means of accessing the employment that this business activity directly or indirectly generates. To this must be added the fact that every day many people cross the border between Tétouan and Ceuta, or between Nador and Melilla, under an agreement that allows residents in the areas of influence of Tétouan and Nador to enter Spain's Autonomous Cities without visas, provided that they do not spend the night in Spanish territory. Many of these people work there or travel to these cities to buy goods, which they later re-sell in Morocco. In fact, the trade between Ceuta and Melilla and the surrounding region is one of the most important elements of their economy (Sayahi, 2005: 197).

The second area that contains a higher number of Spanish speakers is the Sahara, which extends from the port of Tarfaya to the port of La Güera. There, Spanish remains a living language, despite the Moroccan authorities deciding to demote its position in education and the administration for a certain period after 1975 (Gil Pedromingo and Otero Roth, 2008: 10). However, the Spanish media outlets that broadcast from the Canary Islands and the shared activities of the two regions have contributed to Spanish's continued presence in the region.

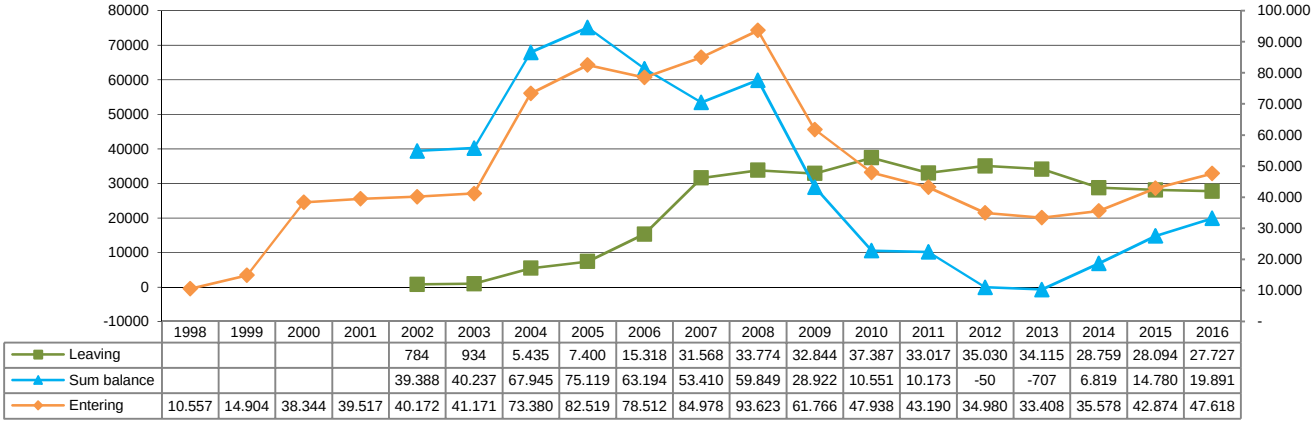
3. Migration as a medium of consolidation of Spanish in Morocco

Another of the elements that have contributed to keeping Spanish alive in the region is immigration. In recent years, Spain has become a host country for immigrants, many of whom are Moroccan. In fact, for a long time, the Moroccan immigrant community was the largest in Spain, before it was surpassed by the Romanian community. This phenomenon is also generating increased interest in Spanish culture

and the Spanish language in Morocco, through the ties between Moroccan immigrants in Spain and their relatives in Morocco (López García and Berriane, 2004).

Chart 2

FLOWS OF MOROCCAN NATIONALS ENTERING AND LEAVING SPAIN



	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Leaving					784	934	5.435	7.400	15.318	31.568	33.774	32.844	37.387	33.017	35.030	34.115	28.759	28.094	27.727
Sum balance					39.388	40.237	67.945	75.119	63.194	53.410	59.849	28.922	10.551	10.173	-50	-707	6.819	14.780	19.891
Entering	10.557	14.904	38.344	39.517	40.172	41.171	73.380	82.519	78.512	84.978	93.623	61.766	47.938	43.190	34.980	33.408	35.578	42.874	47.618

Source: National Statistics Institute 2017, Statistics for variations in residency.

As shown in the above chart, there were more arrivals than departures of Moroccan residents in Spain from 2002 to 2011. However, in 2009 a downward trend began, ending in 2012 and 2013, the only years in the historical series when departures exceeded arrivals, largely due to the effects of the international economic crisis, which hit Spain particularly hard. Nevertheless, from 2013 onwards the ratio of arrivals to departures began to make a strong recovery. The relationship between this immigrant group and the Spanish culture and language, before their arrival in Spain, varies considerably according to their place of origin, their reasons for emigrating and their socio-economic level. Regardless, departures of residents result in a large contingent of Moroccans returning to their country after having soaked up, to varying degrees, Spanish customs and some level of knowledge of the Spanish language. This drives the dissemination of Spanish culture and language in this neighbouring country, for two reasons. Firstly, Moroccan returnees cause a net increase in the non-native Spanish-speaking community in Morocco. To this must be added the fact that many of those who return do so to their place of origin, which in 55% of cases is in the former area of French influence. Therefore, return migration contributes to increasing the geographic reach of Spanish speakers in the Alaouite kingdom. Secondly, since this emigration is primarily economic and of low-skilled workers, the returning immigrants also increase knowledge of Spanish among the working class in Morocco.

4. Spanish in education

Spanish is also present in the Moroccan education system from secondary education onwards, both in the *collège* and non-compulsory ("qualification") stages, although students taking Spanish represent no more than 8% of the total.

Although Spanish lessons have been included in Morocco's baccalaureate since the 1960s, its prominence has varied over the years. Even at the height of its popularity, the proportion of students who studied Spanish never exceeded 9% of the total. Regardless, today students in *collège* mostly choose English and normally maintain that selection when they move on to the next educational cycle, called *tronc commun.* As a result, the position of Spanish in the Moroccan education system has deteriorated in recent years, and can no longer be considered stable. Despite the interest in Spanish, it seems to occupy the position of a third foreign language, after French and English. However, given the country's complex linguistic situation, this option is not free from complications. In any case, in the "qualification" stage of secondary education, Spanish has come to be offered, at its peak, by as many as 51% of centres and its presence is even greater in educational centres in northern Morocco.

Chart 3

NUMBER OF STUDENTS TAKING SPANISH

AS A SECOND FOREIGN LANGUAGE IN MOROCCAN SECONDARY EDUCATION

	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016
Collège secondary education	18.642	18.764	17.344	18.005	19.095	20.088
"Qualification" secondary education	52.151	53.167	54.503	49.766	49.755	49.731

Source: Spanish Ministry of Education, Culture and Sport, *El mundo estudia español 2016* [The World is Learning Spanish 2016], p. 338.

Table 1

SPANISH AS A FOREIGN LANGUAGE IN

MOROCCAN SECONDARY EDUCATION. 2010-2011 SCHOOL YEAR

	"Qualification" secondary education			Collège *secondary education*		
Regional educational authorities	**Schools**	**Teachers**	**Students**	**Schools**	**Teachers**	**Students**
Souss-Massa-Drâa-Agadir	26	42	2,569	19	18	2,462
Laâyoune-Boujdour-Sakia El Hamra	6	9	1,386	4	4	1,056
Oued Ed-Dahab-Lagouira Dakhla	4	4	157	-	-	-
Guelmim-Es Semara	4	4	-	1	1	-
Tadla-Azilal-Béni Mellal	14	20	1,567	5	5	733
Marrakech-Tensift-El Haouz	24	49	2,908	-	-	87
Total southern region	**78**	**128**	**8,587**	**29**	**28**	**4,338**
Doukkala-Abda	4	11	288	5	3	605
Chaouia-Ouardigha-Settat	5	7	1,030	7	3	615
Grand Casablanca	41	76	8,691	25	25	2,859
Rabat-Salé-Zemmour-Zaer	22	47	2,701	3	4	480
Gharb-Chrarda-Béni Hssen-Kénitra	12	26	2,159	1	1	-
Total central region	**84**	**167**	**14,869**	**41**	**36**	**4,559**
Tangier-Tetouan	38	101	11,848	31	31	4,545
Taza-Al Hoceima-Taounate	17	25	1,136	13	14	1,337
Oriental	27	53	3,385	6	5	399
Total northern region	**82**	**179**	**16,36**	**50**	**50**	**6,281**

			9			
Fès-Boulemane	36	51	5,901	9	8	1,815
Meknès-Tafilalet	28	60	6,425	9	9	1,649
Total central-eastern region	**64**	**111**	**12,326**	**18**	**17**	**3,464**
Totals	**308**	**585**	**52,151**	**138**	**131**	**18,642**

Source: David Fernández Vítores, 2014, *La lengua española en Marruecos* [The Spanish language in Morocco], pp. 62-63.

Nevertheless, the comparative data for the school years for the past ten years show clear stability in both the number of students taking Spanish, the number of teachers for the subject, and the number of centres that offer Spanish.

In higher education, Spanish is also present as a speciality language or a complementary language (Roldán Romero, 2005: 39). Courses in Spanish Language and Literature are currently taught in seven Moroccan university faculties: The Rabat Faculty of Letters and Human Sciences, the Casablanca Aïn Chock Faculty of Letters and Human Sciences, the Dhar El Mehraz - Fès Faculty of Letters and Human Sciences, the Tétouan Faculty of Letters and Human Sciences, the Agadir Faculty of Letters and Human Sciences, the Nador Multidisciplinary Faculty and the King Fahd Translation University College in Tangier. Although the number of students who choose this branch has declined slightly since the 2008-09 academic year, when the highest number of students was recorded, the trend in the number of enrolments shows considerable stability over time. In the 2011-12 academic year, 2,692 students attended Spanish Language and Literature courses.

Table 2

NUMBER OF STUDENTS ATTENDING COURSES IN SPANISH LANGUAGE AND LITERATURE IN MOROCCAN UNIVERSITY EDUCATION (2000-2012)

	2000/2001	2001/2002	2002/2003	2003/2004	2004/2005	2005/2006
Licence (bachelor's degree)	2,228	2,581	2,751	2,676	2,884	3,201
Master's degree	14	10	7		21	40

(DESA and DESS)						
Doctorate	63	63	63	40	29	27
Total	2,305	2,654	2,821	2,716	2,934	3,268

	2006/ 2007	2007/2 008	2008/ 2009	2009/ 2010	2010/ 2011	2011/ 2012
Licence (bachelor's degree)	2,892	3,386	2,757	2,400	2,425	2,524
Master's degree (DESA and DESS)	37	41	108	91	73	115
Doctorate	25	33	16	13	43	53
Total	2,954	3,460	2,881	2,504	2,541	2,692

Source: David Fernández Vítores, 2014, *La lengua* española en Marruecos [The Spanish Language in Morocco], p. 65.

In addition, Spain's Ministry of Education, Culture and Sport has an Education Office in the Spanish Embassy in Rabat, which is responsible for managing the network of centres through which 347 teachers give classes to 4,383[51] students. The network constitutes the Spanish Ministry of Education's most significant presence in Morocco. It comprises eleven[52] centres, of which five (Al Hoceima, Larache, Casablanca, Nador and Rabat) are integrated and provide all levels of the Spanish school education system, from early years (*infantil)* to higher secondary education (*bachillerato*). Two schools offer secondary education in Tangier and Tétouan; the latter also has a centre that offers vocational training. In addition, three schools offer primary education in Tangier, Tétouan and Larache. The centre in Larache also offers compulsory secondary education. These are prestigious centres with demand that exceeds the number of places offered. In addition, this demand is greater among Moroccan nationals than among Spanish residents, giving some idea of the interest in the comprehensive study of Spanish language and culture in certain circles of Moroccan society. In the 2015-2016 academic year, approximately 60% of pupils were Moroccan nationals and 40% were Spanish nationals.

[51] Figures for the 2015-2016 academic year. The figure of 347 teachers does not include the 2 teachers at M.C. El Español (Laayoune/Sahara).

[52] Also including La Paz in Laayoune, which is managed by the Education Office of the Spanish Embassy in Morocco.

Moreover, Morocco is, after Brazil, the country with the most Instituto Cervantes centres. Teaching Spanish, curating libraries and managing a wide range of cultural activities are the three pillars of Instituto Cervantes' activities in Casablanca, Rabat, Fez, Tétouan, Tangier and Marrakech. In addition, Agadir, Chefchaouene, Essaouira, Larache, Meknes and Nador have satellite offices of Instituto Cervantes. In total there are 33 deployed teachers and 167 collaborating teachers. More than twelve thousand enrolments in the 2012-2013 academic year ensure that the general objective of disseminating Spanish culture and language is achieved, and this number has been maintained, with a slight increase, to the present.

Table 3

ACTIVITIES OF INSTITUTO CERVANTES CENTRES IN MOROCCO 2012-2013 ACADEMIC YEAR

Instituto Cervantes centre	*No. of enrolments*	*No. of students*	*Hours/student*
Casablanca	4,441	2,546	155,311
Fez	775	544	43,127
Marrakech	2,001	1,137	61,620
Rabat	3,210	2,120	156,082
Tangier	1,911	1,393	111,724
Tétouan	1,270	960	67,607
Total	**13,608**	**8,700**	**595,471**

Source: David Fernández Vítores, 2014, *La lengua* española en Marruecos [The Spanish Language in Morocco], p. 68.

5. The world of culture and the media

At present, the Spanish book publishing industry has some presence in the Moroccan market, partially due to demand from Spanish institutions (Instituto Cervantes, educational centres) throughout Morocco and especially in Tangier, Tétouan, Rabat and Larache.

As a result, events such as the International Publishing and Book Fair (SIEL), which is held every year in Casablanca, increasingly facilitate Spanish businesses' entry into the Moroccan publishing market. In fact, Spain occupies an ever larger space at the fair, strongly linked to the efforts of the Moroccan Directorate-General for Books to increase Spain's prominence at the fair. Morocco has been the main African market for Spanish publishing for many years, representing over 40% of the turnover in the continent in 2016. Madagascar sits in a distant second place, with 8.13%. However, Morocco is third in terms of the number of copies of Spanish publications exported to

Africa, behind Cameroon and Togo (Spanish Federation of Book Publishing Chambers [FEDECALI], 2016).

In 2011, for the first time Morocco was among the twenty top countries worldwide in terms of non-university educational books in Spanish received, and among the top twenty-five in terms of instructional books (FEDECALI, 2012: 39). In fact, in 2016 half of the turnover generated by Spanish publishing houses in Morocco was from Spanish language teaching books. It is no surprise that, outside Europe, Morocco receives the second largest quantity of such books of any country.

As regards the media, there is a very limited range of Spanish-language radio and television broadcasting in Morocco. The main public channel of Société nationale de radiodiffusion et de télévision (SNRT), Al Aloula Sat, includes a daily news show in Spanish lasting half an hour[53], broadcast at 2.20pm. In addition, the international radio station has an hour in Spanish every day, although this is less than the time for the programmes in French and English, each of which occupy an hour and a half (Yahya, 2011). However, these programmes are aimed at the Spanish-speaking community residing abroad, and not at Moroccans.

In the 1990s, Spanish television programmes were very popular in the regions of Morocco that were able to receive them, and above all football matches, which attracted large audiences who avidly followed Spain's national football league. In addition to the north of the country—where Spanish channels are received throughout the year—Spanish television can also be watched in many other cities in Morocco. Nevertheless, although Spanish football still generates considerable interest among the Moroccan public, the viewing figures for Spanish television have gradually declined in recent years, partly due to greater availability of foreign television driven by technological advances and to the Internet breaking onto the country's media scene.

As regards the press, of the 618 periodicals published in Morocco, 448 are in Arabic, 164 are in French and 5 are in Amazigh. [54] Almost all of the various Spanish-language magazines that attempted to carve a niche in the Moroccan market did not succeed and have disappeared. The *Atalayar* magazine is the only one that remains. Since the *La Mañana* newspaper stopped being printed in 2006, there has been a notable absence of daily print news in Spanish in Morocco's media landscape.

Apart from the Spanish-language digital periodicals headquartered in Morocco, Moroccans can also view the most widely read Spanish dailies in digital format. Nonetheless, the periodicals that are most visited by Moroccans are not those that offer general information on Spain and the rest of the world, such as *elpais.es* and *elmundo.es*, but rather the sports newspapers. Of the five hundred websites that are visited most by Moroccans, only three are in Spanish. Strangely, two of these are sports newspapers: *marca.com* and *as.com*.

6. Business

Although the main purpose of international commercial transactions is to obtain profits for the countries that perform them, there is no doubt that such transactions are also a key channel for cultural and linguistic exchanges. Every Spanish or Hispano-

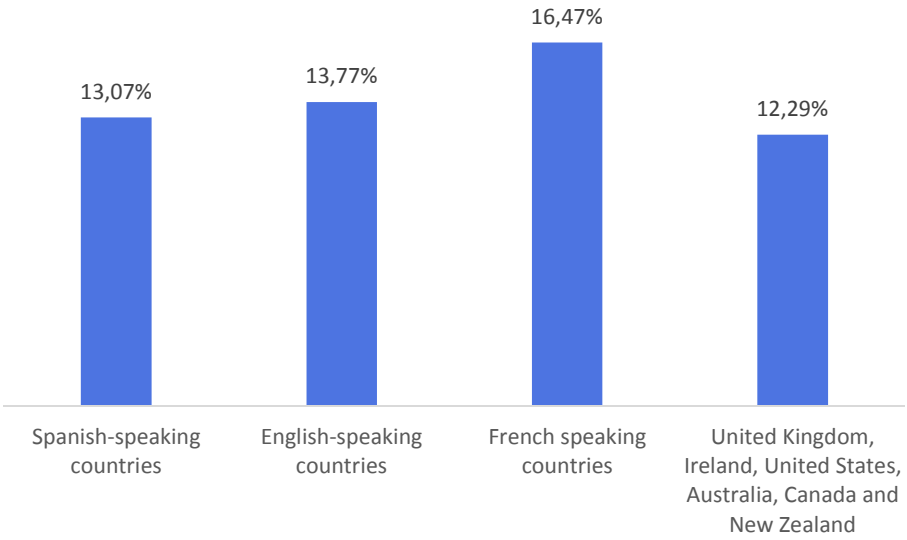
[53] See: http://www.snrt.ma/grille_programmes.php.
[54] National Portal of the Kingdom of Morocco, 2013.

American product that enters Morocco brings with it cultural characteristics, and inevitably generates some linguistic activity in Spanish (translation, interpreting, localization, etc.) which, in the long term, has an influence on overall demand for Spanish in the country. At present, Spanish ranks third (13.07%) among the languages of origin of Morocco's imports, behind French (16.47%) and English (13.77%).[55] The fact that it is almost on a par with English reflects the vitality Spanish possesses as a language of trade, despite it being used significantly less as an international language in business.

Chart 4

VOLUME OF IMPORTS INTO MOROCCO

BY LANGUAGE OF THE COUNTRY OF ORIGIN OF THE PRODUCT. 2011



Source: David Fernández Vítores, 2014, *La lengua* española en Marruecos [The Spanish Language in Morocco], p. 115.

Despite this, it is important to note that the "English-speaking countries" category includes a number of countries that use English as an official language for unifying purposes, despite the influence of the main local languages. If only the main English-speaking countries are taken into consideration, the percentage of the import market for English would be lower than that for Spanish.

As regards the Spanish-speaking countries that Morocco imports from, it should be noted that, apart from Spain, the only country representing a significant percentage is Argentina—imports from the country amounted to 4,470,490 dirhams in 2011. However, the fact that Morocco has commercial ties of varying importance with all of

[55] Result of an in-house field study, prepared based on data obtained from the Exchange Office (*Office des Changes*), 2012, pp. 109-112.

the Spanish-speaking countries is a reflection of its nascent but robust openness to the Spanish-speaking market; above all taking into account that the same is not true for English- or French-speaking countries. Regardless, the high volume of imports from Spain, compared with other countries where Spanish is spoken, underscores Spain's key role in introducing the Hispanic culture into this Maghreb country. Furthermore, the large populations of countries such as Mexico, Argentina and Colombia reflect the growth potential of the market for products from Spanish-speaking countries in Morocco.

Additionally, there is growing demand for Spanish from Moroccan companies, albeit as a second or third option: after French, which continues to be the language *par excellence* for international business, or English, which is increasingly required by large multinationals established in Morocco, and by Moroccan companies with international operations. Currently, Spanish, with 10%, ranks third among the languages most frequently sought by Moroccan companies, after French and English, with 64.84% and 21.9%, respectively.[56]

7. Conclusion: towards greater dissemination of Spanish through education

The presence of the Spanish language and culture—and of cultural content in Spanish— in Morocco has not reached the level which might have been expected considering our historical and geographical ties, the interest of the Moroccan population, and Spain's commitment to educational and cultural initiatives in Morocco—one of the countries on which such efforts are particularly focused.

For both countries, however, this is an especially propitious moment for adopting measures to advance the dissemination of the Spanish language and culture in Morocco. In addition to historical factors, and to geographical and cultural proximity, the significant migratory flow between the two countries, the strong presence of Moroccan students or students of Moroccan origin in Spain and, above all, the magnitude of the growing economic exchanges between citizens of the two kingdoms, have rekindled interest in learning Spanish.

Both countries have the political will, expressed in the Declaration of 3 October 2012 on the occasion of the high-level meeting between their governments, to "strengthen the presence of Spanish in those areas of Morocco in which it is most present, and to reinforce it in the country as a whole. The purpose of such efforts is to increase our cultural and economic ties, and thereby help to improve the quality of life of our citizens".

Without question, one of the key pillars for bolstering the use of Spanish in Morocco is education. The gaps are evident at all levels of education, in each of which there is room for joint efforts to improve the Moroccan population's knowledge of Spanish, always with a view to benefiting from the added value that the citizens of this country may contribute.

Thus, we can see, for example, that in primary and secondary education, the demand for learning Spanish is not met by the supply. Many Spanish schools in Morocco—despite a stable volume of enrolments in recent years (with slight,

[56] Results of a field study undertaken by the author based on a sample of 54,467 employment notices taken from Morocco's four job websites (Fernández Vítores, 2014).

predictable, fluctuations depending on their geographical location)—have already reached capacity levels for enrolments. Some, such as those in Tangier, Rabat and Casablanca, have had to turn down requests for admission due to a lack of classroom space.

The Moroccan educational system also has unmet demand: the Spanish on offer at secondary schools cannot always be guaranteed to those students who have chosen this language at primary school level, and therefore many of them are obliged to choose other language options. In Morocco's non-university education system, Spanish is chosen by approximately 70,000 students. By contrast, some 450,000 students opt for English. The other foreign languages on offer (German and Italian) are far behind Spanish.

As regards the university education system, Spanish is taught at seven state universities in Morocco; there is, moreover, conspicuous interest in these studies.

Given the high number of Moroccan students who come to Spain to pursue university studies, it is foreseeable that any Spanish university satellite centres, or even universities in their own right established in Morocco, could be very successful. In recent years, cooperation between Spanish and Moroccan universities has intensified, but there are still no Spanish university centres open in Morocco. Greater presence of both public and private Spanish universities in Morocco would enable the teaching of courses in disciplines of common interest, and would also foster cooperation in the fields of science and research.

Finally, the Instituto Cervantes centres in Morocco constitute a highly valuable instrument for the dissemination of Spanish, and have yet to exhaust their potential. A greater allocation of resources from the headquarters in Madrid would seem the perfect strategy for strengthening the presence of Spanish—and of Spanish culture in Spanish—in the areas in which these centres are located.

Education, therefore, appears to be the ideal foundation from which to stimulate expansion of Spanish in Morocco, and to make this country the natural point of entry for the Spanish language, and Spanish culture and products, in the other countries of the Maghreb.

8. Bibliography

BENJELLOUN, Mohamed Othman (2012). "La question de la diversité à la lumière des résultats de l'enquête nationale sur le lien social de l'IRES", in the seminar *Politique de la diversité: quelle opérationnalisation sous la nouvelle constitution?* Rabat, IRES.

BOURDIEU, Pierre (1985). *Ce que parler veut dire: l'économie des échanges linguistiques*. Madrid, Akal.

ENNAJI, Moha (2002). "Language contact, arabization policy and education in Morocco", in ROUCHDY, Aleya (ed.). *Language contact and language conflict in Arabic: variations on a sociolinguistic theme.* Oxford, Routledge Curzon, pp. 70-90.

FEDECALI (FEDERACIÓN ESPAÑOLA DE CÁMARAS DEL LIBRO) (2012). *Comercio exterior del libro 2012.* Madrid, Federación Española de Cámaras del Libro. Available at: http://fedecali.es/wp-content/uploads/2017/10/ComercioExterior2012.pdf

— (2016). *Comercio exterior del libro 2016.* Madrid, Federación Española de Cámaras del Libro. Available at: http://fedecali.es/comercio-exterior/

FERNÁNDEZ VÍTORES, David (2014). *La lengua española en Marruecos.* Rabat, AECID, Embajada de España, Instituto de Estudios Hispano-Lusos and Universidad Mohamed V-Rabat. Available at: www.exteriores.gob.es/Embajadas/RABAT/es/Noticias/Documents/LENGESPMARR.pdf

GIL PEDROMINGO, Leyre and OTERO ROTH, Jaime (2008). "Enseñanza y uso de la lengua española en el Sáhara Occidental", *ARI (Análisis del Real Instituto Elcano),* 116. Available at: http://realinstitutoelcano.org/wps/wcm/connect/dc29ac804f0199d3a40ee43170baead1/ARI116-2008_Gil_Otero_lengua_espanola_Sahara_Occidental.pdf?MOD=AJPERES&CACHEID=dc29ac804f0199d3a40ee43170baead1

LECLERC, Jacques (2013). *L'aménagement linguistique dans le monde.* Available at: http://www.tlfq.ulaval.ca/axl/afrique/maroc.htm

LÓPEZ GARCÍA, Bernabé and BERRIANE, Mohamed (2004). *Atlas 2004 de la inmigración marroquí en España.* Madrid, Observatorio Permanente de la Inmigración, Ediciones Universidad Autónoma de Madrid.

MINISTRY OF EDUCATION OF SPAIN (2016). *El mundo estudia español 2016*. Madrid, Ministerio de Educación. Available at: https://sede.educacion.gob.es/publiventa/el-mundo-estudia-espanol-2016/ensenanza-lengua-espanola/22229

MORATINOS, Miguel Ángel (1993). "Presencia cultural de España en el Magreb", in MORALES LEZCANO, Víctor *et al., Presencia cultural de España en el Magreb: pasado y presente de una relación cultural «sui generis» entre vecinos mediterráneos.* Madrid, MAPFRE.

MOUSTAOUI, Adil (2006). "Lengua y legislación en Marruecos", *Documents de treball,* 22. Barcelona, CIEMEN/Mercator.

OFFICE DES CHANGES (2012). *Commerce extérieur du Maroc.* Provisional edition of 2011. Available at: http://www.oc.gov.ma/portal/sites/default/files/actualites/RAPPORT%20COMMERCE%20EXTERIEUR;%20EDITION%20PROVISOIRE%202011%20.pdf

NATIONAL PORTAL OF THE KINGDOM OF MOROCCO (2013). *Médias et communication.* Available at: http://www.maroc.ma/PortailInst/Fr/MenuGauche/Société+et+culture/Médias+et+communication/Le+secteur+de+la+presse+écrite.htm. Consulted on 3 January 2013.

KINGDOM OF MOROCCO (2011). "Constitution du Royaume du Maroc de 2011", *Bulletin officiel du Royaume de Maroc,* 5.964, 30 July 2011. Available at: http://www.wipo.int/wipolex/es/text.jsp?file_id=311565

ROLDÁN ROMERO, Magdalena (2005). "El español en el contexto sociolingüístico marroquí: evolución y perspectivas (I)", *Aljamía,* 16, pp. 33-46. Available at: https://sede.educacion.gob.es/publiventa/detalle.action?cod=13437

— (2006). "El español en el contexto sociolingüístico marroquí: evolución y perspectivas (II)", *Aljamía,* 17, pp. 25-38. Available at: https://sede.educacion.gob.es/publiventa/detalle.action?cod=13438

SAYAHI, Lotfi (2005). "Language and identity among speakers of Spanish in northern Morocco: between ethnolinguistic vitality and acculturation", *Journal of sociolinguistics,* 9 (1), pp. 95-107.

UNIVERSIDAD DE VALENCIA and MINISTERIO DE EDUCACIÓN (eds.) (2011). *El mundo estudia español 2009-2010*. Valencia, Universidad de Valencia Estudio General; Madrid, Ministerio de Educación. Available at: https://www.mecd.gob.es/dam/jcr:91c203ae-d3e1-4aa0-b758-c3d43d11cc70/texto-completo2009ok-pdf.pdf

YAHYA, Mohamed (2011). "Le poids de l'immigration et son impact sur le développement économique des deux rives de la Méditerranée", in EL HOUDAÏGUI, R. *et al*. (coords.). *Les risques en Méditerranée. Conséquences sur le trinôme. Union Européenne, Espagne, Maroc: Actes des deuxièmes journées de dialogue Euro-marocain*. Cádiz, Publicaciones de la Universidad de Cádiz, pp. 73-78.

Equatorial Guinea: "A Hispanic country with Bantu roots"

Javier MORILLAS
Professor of Economic Structure, CEU San Pablo University. Head of the MAPFRE-IdL-CEU San Pablo University Foundations' Research Group. CEO of ASPrivatBank in Spain. President of the Spanish Association of Foreign Banking Representatives (AERBE).

1. The 12th of October: A nation is born

The motto on the official crest of the Republic of Equatorial Guinea is "*Unidad, Paz, Justicia*" —Unity, Peace, and Justice. A *united* republic, which achieved independence *peacefully*, in a quest for greater *justice*. The country's capital is Malabo—formerly Santa Isabel—and it comprises a continental region, Río Muni, and an insular region comprising the islands of Bioko (formerly Fernando Pó), the Elobeys, Corisco, and Annobón. Spanish is the official language, although local continental and island languages survive, such as Bube, Fang, and Annobonese.

It has been called a country with "Hispanic and Bantu roots" by its leaders and presidents. The main public holiday and national day of celebration is 12 October. It was on this date that the country became independent in 1968, through a peaceful process after a four-year period of "pre-autonomy" during which it was led by Bonifacio Ondó, one of the nation's historical leaders.

Spanish is the language used in the education system, from village schools upwards, throughout the primary and secondary levels of education, and in further and higher education, vocational training, and continuing education. It is used at the National University of Equatorial Guinea (UNGE) and in courses and seminars given by the universities of Alcalá de Henares, CEU San Pablo, and other national and international institutions, especially from Hispano-American countries, and particularly Cuba, with which Equatorial Guinea has had particularly strong links since the early 19th century, as we will see later in its economic timeline.

Spanish is also the common language used in the country's administration, and in political and election campaigns, as shown in the accompanying images, from legislative election campaigns—"*Ciudadano de Guinea Ecuatorial, acude a las urnas...*" (Citizen of Equatorial Guinea, vote!)—posters announcing the "*composición de las mesas electorales y el procedimiento de votación*" (polling station officials and voting procedures), and voting slips for different candidates and parties, as well as election results by district, vote-counting records, and other election documents.

Since 2009, Equatorial Guinea has participated in the Ibero-American Summits as an associate State, due to its cultural and linguistic links with the countries of Hispano-America, and it has applied to become a full member. In fact, Equatorial Guinea has been a member of the Organization of Ibero-American States since 1979.

Guinea's renowned writers and authors use Spanish: deceased historical figures such as Leoncio Evita, Daniel Jones, Marcelo Asistencia Ndongo, Constantino Ocháa, Ángel Nguema, Raquel Llombé, Rafael María Nze, Juan Balboa, and the former

Minister of Culture, Leandro Mbomio; and other prominent writers, such as Donato Ndongo, Francisco Zamora, Juan Ávila, and Anacleto Oló, and the contemporary authors Guillermina Mekuy and Justo Bolekia—whom some say deserve the Nobel Prize for Literature.

The Equatorial Guinean Academy of the Spanish Language was admitted to the Association of Academies of the Spanish Language in 2016. Public figures from academia, such as Trinidad Morgades, vice-rector of the UNGE, were already participating in the Association's international congresses and meetings. Members include Agustín Nze, Julián Bibang, and Federico Edjoo.

Spanish is also the language used in the trade, financial, and business spheres. It is the language used by the National Bank of Equatorial Guinea (BANGE, see accompanying advertisement). And, naturally, Spanish is the language used by the various sectoral, social, and business organizations, and by the chambers of commerce in Malabo and Río Muni, as well as the International Hispano-Equatorial Guinean Official Chamber of Commerce and Industry (COCIHEG, see accompanying leaflet). The creation of the COCIHEG was one of the first bilateral cooperation projects and agreements between Spain and Equatorial Guinea following the so-called "*Golpe de Libertad*" (Freedom Coup) of 1979 carried out by President Teodoro Obiang, which brought an end to the rule of Francisco Macías, president-elect on the date independence was granted by Spain. In subsequent years, the then ambassador of Equatorial Guinea in Madrid, Alejandro Evuna Owono, rebuilt relations with the former metropolis in conjunction with Spanish President of the Government, Adolfo Suárez. It was agreed that the Spanish Ministry of Defence's Aviocar aircraft would remain, to guarantee transport between islands. In addition, education agreements were reached with the Ministry of Education through the Spanish Federation of Religious Orders in Education (FERE), which was to rebuild the network of schools in all of the country's towns, forming the basis of the current system. Due to more pressing matters, the mixed Chamber of Commerce was not finalized until 1998. Its most senior representatives included Juan José Pérez de Burgos, chairman of Ecuato Guineana de Aviación, the national airline, which broke Iberia's monopoly on the route between Madrid and Malabo, and Carmelo Nvono-Ncá—economist, member of the CEU San Pablo University "University as an Agent for Development Cooperation" research group, lecturer at Spain's International Studies Society, and current Ambassador of Equatorial Guinea to the European Union, Benelux, Finland and Turkey.

With the rise of the oil industry, there were problems in the financial sector, aggravated since the late 1990s by the limited presence of international banking. Efforts were made by companies from Equatorial Guinean, Spain, and other foreign companies to establish a Spanish bank, without success. Therefore, despite initial interest, Banco Sabadell reconsidered the idea, in view of its expansion underway in Asia. Although other Spanish banks, such as BBVA and Santander, also considered establishing branches in the country, and even though thought was given to opening some kind of joint branch to share operating and reputational costs, the project never took shape. Nor did the established French banking presence manage to seize on the proximity of Gabon and Cameroon to lay down roots, as the fact that their publications were in French made it difficult for the population of Equatorial Guinea to use their services. It is for these reasons that development and expansion followed the establishment of the aforementioned BANGE, established with national, and predominantly private, capital.

2. Economic and commercial timeline for Equatorial Guinea: A five-stage process of economic configuration

The following economic timeline reflects the link with the Hispanic world that has existed in Equatorial Guinea since the 15th century, as part of a process that we have called a "five-stage process of economic configuration".

1st stage: Beginning of centre-periphery linkage

1471. Annobón as part of new trade routes: arrival of João de Santarém and Pedro Escobar.

1472. The country takes its place on the map of the world's major maritime trade routes when Fernão do Pó arrives at the island that would later bear his name. The spread of Christianity begins.

1556. Diego Hernández arrives on the caravel *San Antón* from the Canary Islands, as part of a trade mission.

1560. Pedro Hernández arrives on the ship *San Antón*, and continues the trade mission: oil, fruit, coconuts, yams…

1561. Diego Hernández returns on the caravel *San Lázaro*: bananas, feathers, ostrich eggs…

1571. Pedro Rodríguez arrives on the ship *Candelaria* to continue the trade mission. Ports of call in South Africa.

1579. Juan de Guzmán continues the trade: ivory and slaves "which are greatly appreciated for domestic service" are purchased through the Canary Islands, sold by local leaders. The continental inland Fang tribes start arriving in Muni.

1581. Philip II strengthens the Guinea-Canaries-Europe-Americas trade routes. Domingo de Cea, on the ship *San Antonio* trades in bark, tropical rope fibre…

17th century. Consolidation of Portuguese and Spanish trade under Philip III and Philip IV: trading posts, missionaries.

1771. Reign of Charles II: cultural action by Father Gregorio Martins das Neves in Fernando Pó and Annobón; Portuguese and Italian missionaries.

1772. Vicente Gómez Ferreira describes the economy of Fernando Pó.

2nd stage: The beginning of a long wave

1777. Treaty of San Ildefonso: Portugal cedes Equatorial Guinea "so that the vassals of the Spanish Crown may establish themselves therein and trade with opposing ports and coasts". The slave trade begins to decline.

24-12-1778. The first Governor, the Count of Argelejos, establishes San Carlos, now known as Luba. The first smiths, carpenters, and builders arrive, as well as the surgeons José Martí and Miguel Martín. Research to boost trade and production of yams, coconuts, bananas, chickens, goats, and pigs. Guillermo Carbonell recognizes the Bay of Santa Isabel as a settlement: Copper and silver coins from 1774 are left, bearing the likeness of Charles III.

8-12-1779. The second governor, Joaquín Primo de Rivera, establishes the capital in Concepción, known now as Riaba. The first furnace, hospital, chapel,

warehouses and other buildings are constructed. Crews are decimated by illness and the Count of Argelejos is buried at sea.

1780. Primo de Rivera reiterates to the Minister of the Indies, Gálvez, the importance of the colony as the key to the Gulf and the Niger River; he recommends creating establishments on the continent and sending Caribbean labourers; he reports that it is not possible to use foreign wood for ships and paper, due to termites and local humidity.

1783. Corisco remains a trading post, and now leads the Portuguese and Spanish slave trade. France adheres to Article 17 of the Treaty of El Pardo; it would demand trade rights for the continental coast.

1785-1816. Reign of Charles IV: a succession of Spanish trading posts and projects, both public and private, from the Canaries, mainland Spain, Cuba, Venezuela, New Granada, and Río de la Plata; similar enterprises by the British, French, Dutch, and Portuguese.

1817. Reign of Ferdinand VII: Spain ends slave trade to the north of the Equator. Brazil and the Antilles are major sources of demand.

1819. Anglo-Spanish Mixed Commission in Freetown to judge ships suspected of trading in slaves.

1820. Spain ends slave trade south of the Equator; trade begins to decline in Corisco. Hispano-British treaties on visiting rights for ships, and mixed commissions against the slave trade in Sierra Leone, and later in Guinea and Cuba.

1827. William Fitzwilliam Owen officially establishes Port Clarence, later Santa Isabel, finding it “remarkably healthy”. The Mixed Commission-Slave Trade transfers from Freetown. The presence of labourers, workers, and freed slaves grows.

17-1-1828. The colony’s second hospital opens in Punta Fernanda. Labourers in Sierra Leone earn 6 pennies/day plus food.

1831. Scientific and trade mission by Marcelino Andrés. The island, capital of the Gulf, welcomes ships flying other flags, which then explore the Niger or buy ivory, oil, and other products.

1833. During the minority of Isabella II, the Mixed Commission withdraws; its establishments are acquired by Dillon, Tenaut y Cía. The continuous coming and going of ships, loading and unloading, and traffic of people and animals break down the protective health shield of Fernando Pó offered by its being an island: Admiral Warren attributes this to not having used “negroes” in the clearing, and “not having taken sanitary measures to protect the health of Europeans”.

1835. The capital has 529 inhabitants. Mr King, first private doctor (of Beecroft). England recognizes Spain’s sovereignty over all of the islands.

1836. First scientific and trade mission by José de Moros y Morellón, who describes activity by Catalan, Valencian, Andalusian, and Antillean merchants.

1837. Bankruptcy of Dillon, Tenaut y Cía, whose assets are acquired by the West African Company.

1837-1839. José de Moros undertakes two more scientific and trade missions, describing the existing companies, the slave trade of Pedro Blanco, and Annobón.

1840. The Baptist missions acquire the assets of the West African Company, introduce mangos, avocados, and breadfruit. The British dismantle a Hispano-Portuguese trading post in Carisco used in the slave trade.

1841. The firm of Pedro de Zulueta in London is very active in triangular money order and trade transactions with Guinea. Failed Niger expedition by Trotter, from Fernando Pó.

1842. The Royal Economic Society of Madrid decides to dedicate its annual competition to an award for the "the author of the best report that proposes the means of colonizing and making useful (said possessions)". Known as the "white man's grave", the survivors of the Trotter expedition return to the island: Lander, Allen and the renowned botanist Dr. Vogel, who are buried there. The first two Guineans to study in Spain depart. Lerena appointed as Royal Steward: new economic projects, focused on cotton, sugarcane, coffee, wood and fish.

1843. Queen Isabella II declared of age. Lerena transfers the capital from Concepción to the new Santa Isabel, establishes a militia, and prohibits unauthorized logging. Royalties on trade and ship tonnage. Corisco, which is restructured commercially, hires pilots for navigating rivers. Headquarters of the colony's Deputy Governorship in Elobey Chico. Court of Justice, new urban map of the capital and grid-shaped enlargement: The obligation to maintain hygiene, to clean streets and sites, to erect enclosures, and other rules are reiterated to "punish those who undertake unjust trade [or] who take indecent liberties with the women of the country […] or to persuade [the latter] to live with them, leaving their husbands or fathers". Garrisons left inland and on the islands. Beecroft appointed governor.

1844. Dominance of people originating from Fernando Pó—known as *Fernandinos* (mulattos)—in trade and in grants relating to towns and territories (Durro, Christian, Bull, Matthews, Attre, Simpson, William, Wilson, Scott, Brews, etc.): end of deforestation and urban construction, efforts to intermediate between Bubi producers and ships, coinciding with a period of high oil prices. Jerónimo Usera establishes his school on Fernando Pó; new schools in Cabo San Juan, Annobón, and Corisco.

1845. Mission by Nicolás Manterola and Guillermo de Aragón, who sail up the Muni River and sign agreements with local tribes. Traders from the Barcelona companies Montagut and Vidal y Rivas establish trading posts for ivory, coconuts, rubber, and palm kernels; the Menorcans Baltasar Simón and Francisco Vicente are notable pioneers of a growing business community and of the country's economic impetus. The population of the capital reaches 1,027. A coal facility is awarded to France on Fernando Pó.

1846. Foreign trade based on exchanges of yams, chickens, oil, wood, ivory, gold dust, hides, sheep, goats, and cows, for clothes, footwear, textiles, weapons, tobacco, spirits, furniture, and items made from iron and steel.

1852. Royal Decree on Free Ports issued by Prime Minister Bravo Murillo: trading routes between Guinea-Canaries-Europe strengthened.

1854. Mission by Rafael de Vargas. The Catalan resident in the country Domingo Mustrich is an active entrepreneur, and is committed to the government of the colony.

1856. Mission by the Presbyterian Martínez Sanz. Census of the capital: 985 inhabitants.

1857. Authorization to Establish the Society of Jesus (Royal Decree of 6 July). First visit by Manuel Iradier. Establishment of different societies to study and colonize Guinea.

1858. First Fundamental Statute. Census by Governor Chacón, with new data on the activities of the inhabitants of Santa Isabel, considered a "den of sin" by the Jesuits. The *Santa María* arrives with engineers, craftsmen, and other personnel to bolster the colony. Living quarters and a hospital are opened on 31 December 1858. Mission by Julián Pellón, exploring the continent from the Bight of Biafra to the mouth of the Muni River, drafting the first detailed map of Fernando Pó.

1858/59. The Tax on Imports and Exports is established, as is the Census of Licences in Use. New tobacco and sugarcane plantations are established.

1859. Settlement of 128 Valencians, who arrived on *La Ferrolana* (76) and the *Santa María*. Promotion of establishment by emancipated Afro-Cubans. The new governor, José de la Gándara, makes the geographic and trade missions official. Sea chart of the western coast of Africa, by J. Navarro.

1861. Royal Order of 20 June 1861, establishing a penal colony on Fernando Pó; the first 33 deportees are sent from Loja, Málaga, to "be used in the work undertaken on the Island that is considered to be of use". Zulueta y Cía guarantees the supply of rice from London.

1862. In August, 200 emancipated Cubans arrive. Insistence on: deforesting; enlarging and cleaning, to ventilate residential areas; building at moderate altitudes, on hillsides, never on beaches, establishing towns at altitudes above 1500 feet; high standards of hygiene, and a healthy diet. Clearing and establishment of settlements in Basilé, Granja Matilda (for livestock and meat) and Santa Cecilia (Granja Cecilia). Intense migration activity due to the annual hiring of Kru labourers, or "*krumanes*", from Liberia. Stimulation of civil works and land grants for farming, according to conduct, diligence, and knowledge. Pay on Fernando Pó: emancipated slaves from Cuba, 4 pesos/month plus upkeep, as a *kruman,* in 1865; a carpenter earns 200 to 300 pounds sterling a year, and his assistants 4-5 shillings a day. At the end of the 19th century, a *kruman* earns 6 pesos or 20 pesetas, or in English currency at 40 pesetas/pound, with a premium on the rate. In the 1870s, he earns 30-40 reals.

6-3-1863. The Governor's Fountain (*Fuente del Gobernador*), the first to offer safe drinking water, starts operating in Kokorobe, near the mouth of the Cónsul River.

1864. Smallpox epidemic. Dr San Martín insists on the need to live in elevated housing, that is well ventilated; sleeping above ground level; better hygiene, more orderly streets and better constructed houses; a good diet, including fresh meat; immigrating in the dry season. Punta Fernanda and another 17 hectares are cleared, and sowed with cotton, coffee, cocoa and tobacco; 700 hectares owned by a company from the Americas are deforested, improving the circulation of air and distancing the capital from miasmic effects. Authorization is given for individuals to hire *krumanes*.

1865. The Governing Body of the colony approves the Contracts Regulation.

1866. New official support for growing tobacco in Banapa, Granja Matilde (Matilde Farm); 56 deportees arrive from Aragon. Enríquez Island becomes a penal colony for the 176 people from Cuba. The *Gaceta de Madrid* (Madrid Gazette), through Royal Order of 22 March, authorizes payments to hire Liberians.

1867. Last Royal Order (of 17 October) of Overseas Legislation relating to the exemption on imports of livestock and the promotion of agriculture.

1868. Change in the Statute (Royal Decree of 12 November) to Naval Station: establishes freedoms, exemptions, and awarding of 50 hectares for farming by Spaniards who so request. Cookron company established in Cocobeach, Muni.

1869. Arrival of 89 farmers and tradespeople (shoemakers, carpenters, builders): They settle in Carboneras to grow yams; work on land owned by Gazulla and López Trello. Arrival of 250 Cuban prisoners on the *San Francisco de Borja*. Inflation due to shortages of food and lodging: The Thompson Hotel in Santa Isabel costs 2 Spanish dollars a day. Census of the capital: 1,223 inhabitants. The Overseas Department requests "people suited for agricultural work": The option of sending more colonists at the expenses of the State is ruled out.

1870. Anselmo Gazulla and Laureano Díaz da Cunha request authorization to enter into contracts with labourers from Cameroon and other places.

1871. Woermann, a German company, in Bata. The Thomas Holt company established in Elobey.

1872. Woermann established in Elobey Chico.

1874. Arrival of the Carlist deportees.

1875. Reign of Alfonso XII: The census of the capital records 1,207 inhabitants. Elobey Chico is the base for Manuel Iradier, who reports on the production of cocoa, coffee, cotton, sugar, mahogany and teak: "A lot of brandy is drunk, and it is called the milk of the country."

1876. Census of 71 Carlist deportees, most of whom have already been pardoned and have adapted to the country.

1877. The annual flow of deportees from different locations continues.

1878. Gold Medal at the Amsterdam Exhibition for the tobacco grown on Fernando Pó.

1879. The Jantzen & Thormählen company established in Elobey.

1880. The Community Boards are created, with income from sales of land, municipal tax, and taxes on sailing ships, and loading and unloading of goods.

1881. The 267 Cuban political deportees arrive on the *Almansa*: They are allocated land, tools and seeds, and grow tobacco and corn, and farm chickens. The price of palm oil starts to fall, making traders on Fernando Pó turn to cocoa farming: Vivour, Barleycorn...

1882. The Claretian order replaces the Jesuits. New impetus for the still limited economic and educational activity.

1883. The Claretian procurator reports a census of 1,106 inhabitants. Jantzen & Thormählen opens a branch in Bata.

1884. The first ten families from the Canary Islands arrive, established by Montes de Oca, pursuant to the Royal Order of 21 October to promote insular immigration to the colony, ordering the construction of houses at medium altitude, on hillsides. Emilio Bonelli draws the first map of the region, published by Enrique D'Almonte.

1885. Information sent to the Spanish Society for Commercial Geography regarding 1,284 inhabitants in the capital. End of Fang migration from the African inland to Muni; craft and hunting skills.

1886. Vivour is the most important farmer on the island in the 1880s. General Villacampa deported to Fernando Pó.

1887. Census records 1,193 inhabitants. Bonelli establishes a trading post in Elobey Chico. Estate of Lieutenant Romera in Bococo. The new Sajoux trading post in Muni is dismantled due to failure to pay tax. The Claretians establish presence in Elobey Chico, and travel from this base around Muni and Munda.

1888. Demand for agricultural work grows, and labourers' pay rises. The deputy governor in Elobey, José Ibarra, demands taxes from the Sajone firm. German trading companies on the Utamboni threatened by the Fang. Pierre Sajoux's firm established on Muni River.

1889. The Alfonso XIII Sanatorium is built in Musola, with an iron framework. The *portos*, who have arrived from Portuguese colonies, prove to be active farmers.

1890. The *Compañía Transatlántica* (the Spanish Line) establishes maritime connections, with branches on the island of Elobey Chico, and in N'Gonde, Ybyn, Ybay, Uela, Cabo San Juan, Membale, and Bolondo; the company also has 20 traders and depots on the Muni River: Dote, Nume and Ylale. Bonelli, as representative of the Spanish Line, along with Valero, travel around the continent with a view to establishing new trading posts. Construction begins on posts in Bolondo, Membale (Benito River), and Cabo San Juan. Valero, Luis Huici, Gentil, Delahet, Lespierre, and Marot improve the nautical charts for Bata; Rouvier and Delastate do the same for Benito.

1891. Of the 3,048 hectares granted for plantations since 1862, 620 are being used, of which 120 belong to whites, 140 to blacks, above all from São Tomé, and 360 to Sierra Leoneans. The Society for Colonization of Fernando Pó is established in Algiers, led by Victoriano Calatayud, with new proposals for development of the colony using Spanish farmers from Algeria who have been requesting such an initiative since 1885. The Jantzen firm pays 5,000 pesetas a year to Spain in tax on its trading post in Elobey and 10 other posts in Muni; it also has two more trading posts in Benito and Bata. Woermann, with 13 trading posts in Muni and 3 in Elobey, Bata and Benito, pays the same amount; Holt, with 10 trading posts in Muni, 3 in Elobey, Bata, and Benito, and Cookron, with 16 in Muni and 2 in Bata and Benito, pay the same amounts. Sajoux, with a trading post in Muni, and several in Bata and Benito, does not pay. The Ambas Bay Trading Company has several branches and is also present in Bata. Dumas Perot firm in Bata and Benito.

1892. The first nine eastern Spanish families arrive from Algiers, totalling 50 people: the Calatayud, Cholvi, Castell, Cayuela, Mayor, Rives, and Aracil families and the Alsina brothers; they are granted two hectares for cocoa farming in densely wooded land (not cleared and with no housing prepared). Crops are first obtained in the fourth year. The Bubi population continues to urbanize—26 are hired by the Government, and 40 by individuals.

1893. First telephone, connecting Santa Isabel and Basilé. First lighthouse at Bata. New protectionist trade law that unites local economic actors.

1895. More eastern Spanish families arrive, from Algiers. Joaquín Costa criticizes the "*armchair, hothouse"* colonization by the Government, followed by economic action from individuals, emboldened by the Spanish Line, which attracts people and capital.

1896. Arrival of 151 political deportees from the Philippines, six of whom are women (the 12 October 1896 edition of *Diario de Manila* mentions Flavia Federzo and six more), and more from Cuba. Presence of Chinese labourers.

1897. Economic dynamism on Fernando Pó: Lolin, Jones, Kinson, Knox and others request a Chamber of Commerce in Santa Isabel. Prohibition of hiring labourers in Sierra Leone. Fall and collapse of coffee exports due to competition from Brazil: Liberia, faced with a drop in revenues from customs duties, imposes mandatory labour services on its population, charging a royalty per labourer, alleviating the scarcity in Guinea. Reina Cristina Hospital—with ironwork—in Santa Isabel. Sack of Spanish trading posts and the trading posts of the German firm Luders on N'Gonde island. In Bata, the Spanish Line and the landowner Isabel Blana promote the transfer of Fang labourers to the island.

1898. Arrival of 70 Fang from Muni to serve as soldiers in Santa Isabel. The Francisco Pérez e Hijo (FRAPEJO) trading post is established.

1900. Romera, the most noteworthy Spanish plantation owner, earns 40,000 pesos a year from his estate, and the foremost plantation owner on Fernando Pó, Amelia Barleycorn, earns more than 100,000 pesos a year from her Boloco estate.

1901. The *Eco de Fernando Poo* newspaper is founded: considerable informative work in the spheres of agriculture, economics, and health. Ibarra begins boarding 27 labourers from the Muni river, starting the path to Fang migration to the island. Creation of the *Curaduría Colonial* (Colonial Trusteeship). Monthly route of Spanish Line steamships.

1902. Alfonso XIII declared of age. The Madrid Gazette publishes the first competitive exams for positions as doctors (Tomás Ramos and Guillermo Rocafort) and in other professions.

1903 The *Guinea Española* magazine is founded, with considerable informative work on farming, disinfection, footwear, and clothing: "the bodies of unclothed children and semi-clothed adults are exposed to insect bites…"

1904. Regulation on property and administration of Spanish territory in the Gulf of Guinea. Apostolic Vicariate on Fernando Pó: A. Coll appointed bishop.

1905. Regulation on Indigenous Work and treaty with Liberia to hire labourers.

1906. Establishment of the Chamber of Agriculture on Fernando Pó, as well as Community Boards, and the Reina Victoria Hospital in San Carlos.

1907. Health regulations regarding construction of towns: "Streets 16 metres wide and houses 12 metres apart; rubbish dumps leeward; houses whitewashed and disinfected; separate neighbourhoods for ladies of light virtue, subject to medical examinations." Vaccine against smallpox mandatory or recommended for the population. Recommended working hours for Europeans: 6 a.m. to 10 a.m. and 3 p.m. to 6 p.m. Bubi shantytowns established. The Spanish Line ranch is established in Moka, and later Gaesa. The offices of Alimana, Lampert, las Vascas and CAIFER are built.

1908. Decree to prevent "*sleeping sickness, by clearing thoroughfares and paths at water crossings and near boggy areas, where the tsetse fly is found; area of influence: 150 m from breeding location; rewards offered for capture of specimens for further study; clearing of at least 100 m of woodland around towns and estates; not rearing pigs, which are prone to incubating the sickness."*

1909. Report by Dr Jorge Ramón, with a view to establishing a Colonial Hygiene Laboratory, published in 1910 with a prologue by his father, Dr Ramón y Cajal, so that "*Spanish Africa may prosper*".

1910. Exploitation of medicinal waters from Mioco, which missionaries bottle and distribute by mule to Concepción, and by sea. Mineral water discovered in Oloita, Balacha de Concepción, Musola, and Kopapua. Beginning of cultivation of *country-tea*: a fragrant form of lemongrass with diuretic and anti-hematurial properties, whose toasted seeds can be used as a coffee substitute. Recommendation to plant eucalyptus trees, to keep away mosquitos.

1912. The radiotelegraphy service between Spain and Equatorial Guinea is launched.

1915. The colony has an estimated 62,000 inhabitants (12,000 on the island). Colonial Guard: 2,000 Guineans.

1916. The Sociedad Ligero Hermanos company is established, for farming cocoa.

1917. On Fernando Pó, 15,000 hectares are in use. Koch obtains Atoxyl and the prize offered by Leopold of Belgium. Dr González, responsible for German soldiers in confinement.

1919. Integration of Germans into the colony following World War One.

1920. Widespread construction of sawmills and trading posts inland. Each town has 15-20 colonial guards posted. New Canary Island banana seedlings. Eleven deportees arrive from Barcelona. José Olmo Boullón highlights the country's appeal to tourists and tourism potential.

1923. Santa Isabel-San Carlos railway under construction, with branch line to Basilé, which already reaches Basupu. Bayer 205 is applied. Establishment of the *Unión de Agricultores de la Guinea Española* (Union of Farmers of Spanish Guinea).

1924. Captured tsetse flies are paid at 0.10 pesetas. Creation of the Health Card and Farmers' Union by Armando Ligero García de Araoz. Rules for construction of hospitals: located at the centre of each region of 30 km of coastline and 1 km of land running inland, approximately 3,000 hectares and an average of 3,000 inhabitants: obligatory service of Bubis on the island used for construction and for construction of health stations.

1925. Dr Rocafort, member of the International Commission that travels around Equatorial Africa to better study health conditions. Canary Islands farmers arrive to grow bananas.

1926. Census of 932 Europeans: 610 Spaniards, 107 Germans, 33 English, 147 Portuguese, and 35 others who are Russian, Lebanese, Syrian, or Indians.

1927. Father Leoncio Fernández discovers the first hot spring on the continent, in Mabavoelo. First female doctor.

1928. Statute of the *Patronato de Indígenas* (Natives Trust), deferred since 1904. Since the facilities on Elobey Chico are isolated by streams of water and have no tsetse flies, they are adapted, in view of their healthiness, as a sanatorium. Constructora Colonial, which is building the road between Santa Isabel and San Carlos, begins work on the hospital at Río Benito. New fumigation campaigns and campaign to eradicate endemic diseases: "*A dead fly is a dead foe"*. Decline in draught horses on estates. Establishment of the Farming Union for the territories in the Gulf of Guinea.

1929. Establishment of the Farming and Forestry Chamber of Continental Spanish Guinea. The companies Compañía Agrícola Industrial de Fernando Poo (CAIFER) and Ligero Hermanos represent Guinean farming at the exhibitions in Seville and Barcelona.

1930. End of transport of labourers from Liberia: problems with agricultural development. The Royal Order, of 23 May, establishes a deposit that guarantees the return ticket or employment contract of anyone who wishes to join the colony, to prevent indigent immigrants.

1931. Prohibition of extraction of palm wine, or *topé*. 30 doctors in Fernando Pó.

1932. 121 unionists from Barcelona deported to Annobón. Morrocans are brought as labour for civil works.

1933. New measures to combat sexually transmitted diseases and other illnesses.

1934. The General Inspectorate for Colonies is authorized to rule on any problems with land grants. Colonial Healthcare Congress. Dr Miguel Martín becomes a private doctor for ALENA, a timber company with a hospital in Río Aye, Ongoneso, and then for the hospital belonging to another timber company, Socogui.

1935. Government of the civil engineer Sánchez Guerra, which begins work on the Port of Bata. A Forest Monitoring Service is created, which curbs abusive logging and designs a repopulation system.

1936. The census records 157,881 natives.

1937. Dr Del Val installs X-ray equipment in his home. A company of riflemen from Ifni arrives in Musola. Collections of money and cocoa for the Franco Government.

1938. Dr Faustino Pérez becomes a grower.

1939. Budget of 14,158,750 pesetas. Cocoa imports into mainland Spain and the Balearic Islands are subject to a duty of 25 gold pesetas for every 100 kg of the annual quota set by Madrid, and 150 gold pesetas for imports exceeding the quota; a duty of 80 gold pesetas is paid every 100 kg of coffee. Other duties apply to timber.

1940. Strong impetus for the cooperative movement. Census of Europeans: 1,200 (750 on Fernando Pó and 450 on the continent).

1941. Report by the economist Román Perpiñá on the economic importance of eliminating African trypanosomiasis, which Dr Víctor Fernández considers exemplary.

1943. Treaty with Nigeria on labourers, boosting cocoa production and the Guinean economy.

1944. Decree on civil rights for “emancipated and unemancipated” natives.

1945. Creation of the Colonial School of Paediatrics. Trypanosomiasis being eradicated.

1947. Broadcast project in San Jorge by Radio Atlanta (from Radio Intercontinental) for Euro-Afro-America.

1948. Laws granting 4 and 20 hectares and commercial forest plots to settled families, with an obligation to repopulate the allocated land.

1950. 40 doctors in Guinea.

1951. Creation of the Hispano-English Employment Agency to hire labourers.

1954. First Manila hemp factory on Fernando Pó. End of the Community Childhood Health Clinic in Santa Isabel, built with the estate of Antonia Llorens, the widow of Mora.

1955. Establishment of the Bata Agricultural Training School and the Santa Isabel School of Arts and Trades. The company Barinco opens a private hospital with 32 beds.

1959. Equatorial Guinea produces 2.15% of the world's cocoa. The two Spanish provinces of Fernando Pó and Río Muni are created, as well as the General Workers' Union of Equatorial Guinea, in exile. An epidemic of Asian flu spreads from Gabon.

1960. Record production of coffee (9,428 tonnes) and bananas. Production of alcoholic beverages prohibited, including *malamba*, made from sugarcane. Elections to Municipal Councils, Residents Assemblies and County Councils.

1962. Record number of livestock, 237,984, and record yield per head.

1963. Record production of palm oil (5,400 tonnes), palm kernels (3,190), and Manila hemp (870).

1964. Regime of Autonomy, led by Bonifacio Ondó.

1966. Record production of timber: 375,645 tonnes. Besora, S.L. established. Begins loading and unloading boats and timber at Bata, then at Santa Isabel and San Carlos. This remains its principal activity until the first oil tankers arrive.

1967. Record number of goats (17,568) and pigs (8,731). Record yields in meat per head from livestock (156.1 kg).

3rd stage: Independence

1968. 12 October: Constitutional consensus and independence. Francisco Macías is President. Record production of cocoa (39,161 tonnes) and record catch of fish (5,600 tonnes). Record consumption of fish (20.9 kg per capita). New record production of coffee (8,522.6 tonnes) and timber (360,985 tonnes). *Televisión de Guinea Ecuatorial* (Television of Equatorial Guinea) opens. Endemic diseases eliminated. Income per capita: 332 dollars, second highest in Sub-Saharan Africa, behind South Africa. Census: 290,000 people: 8,000 Europeans; 25,000 Bubis; and 180,000 Fang, Kombe, Fernandinos and other races. Record expansion of the tourism industry.

1969. The Central Bank of the Republic of Equatorial Guinea opens on 12 October. The Guinean peseta is in circulation. Spain sponsors Guinea's entry into the IMF. Record industrial exports of cocoa derivatives (16 million Guinean pesetas).

1970. The Founding Constitution is repealed. New currency: the ekwele.

1971. Cooperation agreements with Cuba and technical assistance agreements with Spain.

1972. Private banks withdraw completely from the country. Fishing agreement with the USSR, and Soviet naval base for action in Africa. The Guinean peseta is replaced.

1973. Approval of the last State Budget, for 1974, until 1980.

1974. Net International Reserves amounting to 30.2 million dollars.

1976. The last WHO staff member leaves Equatorial Guinea.

4th stage: From the "Freedom Coup" to oil

1979. The "Freedom Coup". Teodoro Obiang Nguema Mbasogo is the new President. The economy hits record lows. Production of cocoa and coffee: 5,408 and 150,000 kg, respectively. Bilateral accords between Spain and Equatorial Guinea. Reconstruction begins. Juan Velarde's team in Guinea. Guinextebank and Banco de Crédito y Desarrollo (BCD) banks are established.

1980. Act on Investment of Foreign Capital. Stabilization Program agreed with IMF. Plan to recover 5,500 hectares of cocoa, partially financed by 8 million dollars from the African Development Bank (AfDB). Lows in guaranteed prices for coffee and cocoa. New State Budget prepared.

1981. Debt with People's Republic of China begins to fall due: 20.4 million dollars.

1982. New constitution. Declared the Year of Work by the President, in response to "the widespread lack of integration of the Equatorial Guinean people into the National Reconstruction Programme". Conference of Donor Countries. Joins the Customs and Economic Union of Central Africa (UDEAC).

1983. Loan from the Arab Bank for Economic Development in Africa (BADEA) for 4.5 million dollars. Société Générale de Surveillance, from Geneva, supervises foreign trade. World Bank Cocoa Rehabilitation Project. Signing of the Treaty Establishing the Economic Community of Central African States (ECCAS).

1984. The joint venture GEPSA (Guineano Española de Petróleos) of which Repsol forms part, discovers gas and oil reserves in Campo Alba, with high extraction costs. First International Hispano-African Cultural Congress, which defines Equatorial Guinea as "a Hispanic country with Bantu roots". Fishing agreement with the EEC. Powers and financial autonomy transferred to the French Treasury. Technical and scientific cooperation agreements with the French government.

1985. Entry into the Bank of Central African States (BEAC), and the Central African CFA franc: abolition of price controls, liberalization of the system of duties, plan for privatization of state plantations and companies. New credit from the IMF and debt rescheduling with the Paris Club. Elf in dominant position as regards potential of oil reserves.

1986. GEPSA (Repsol) hampered, after discovering oil reserves. The annual session of the ECCAS Conference is held in Bata.

1987. Low oil prices. Guinextebank and BCD insolvent. World Bank credit. South African investments.

1988. GEPSA (Repsol) prepares to withdraw from Equatorial Guinea in response to the government boycott. Structural Adjustment Program with IMF, and renegotiation of debt.

1989. GEPSA (Repsol) agrees to sell the rights relating to Campo Alba and neighbouring sectors to the Walter-Nomeco-Samedan Oil consortium. Negotiation of new cooperation agreements with third countries, and general elections.

1990. GEPSA wound up. New investments in the oil industry.

1991. Oil prices rise; significant investment in the oil industry. Extraction begins in December. The public sector employs 2,800 people.

5th stage: The oil era

1992. Beginning of oil exports by Walter-NMC from Campo Alba.

1993. United Meridian Corp. takes part in prospecting.

1994. The CFA franc is devalued on 11 January by 50%. Treaty whereby the Customs and Economic Union of Central Africa (UDEAC) becomes the Economic and Monetary Community of Central Africa (CEMAC), with Cameroon, Congo, Chad, Gabon, and the Central African Republic.

1995. Exports of crude oil continue to grow. Mining Act. Delays with payments and differences with the IMF, which suspends relations with Guinea with the exception of consultations. CCI Bank, from Cameroon, enters Guinea, together with Société Générale, the only retail banks.

1996. The Zafiro oil well opens (ExxonMobil). Fishing agreement with the EU.

1997. Oil production: 56,600 barrels per day. The Topacio oil field opens (Total Fina, Yucong). Recovery in cocoa (6,500 tonnes) and in coffee (7,000 tonnes), as a result of devaluation. Human Development Index (HDI) rises to 0.465.

1998. Oil production: 83,000 barrels per day. Renegotiation of extraction royalties, which rise from 13% to 22.5% for the Guinean treasury. Census records 431,966 inhabitants. Summit of heads of state from Economic and Monetary Community of Central Africa (CEMAC), in Malabo. Flights operated by Ecuato Guineana de Aviación and new investments in hotels, as well as investments by Mobil, Total, Poncal Maquinaria, Besora, Consortium Hispania Lines, and other companies. The HDI rises to 0.549. The Official Hispano-Equatorial Guinean Chamber of Commerce and Industry (COCIHEG) is re-established.

1999. Triton Energy begins extraction from the Ceiba oil field. Currency pegged to the euro: 1 €= 656.34 CFA francs. ECCAS Summit in Malabo. The World Bank reclassifies Equatorial Guinea in its ranking of countries, moving it into category B. Numerous SMEs in Guinea: Ecuato Guineana de Aviación, Poncal Servicios, APRA, Mayo, IPV Vehículos, Kalema, Riesa, Martínez Hnos., Consortium, Getra, Promoport, Mayer, Segami, MulcomService, Simer, EGICO, Guinebeka, etc.

2000. GDP per capita: $2,930, according to the World Bank. Agreement with Nigeria on delimitation of waters, for extraction of crude oil. Signing of the Fifth Lomé Convention between the EU and the African, Caribbean and Pacific Group of States (ACP).

2001. Equatorial Guinea participates for the first time as an observer in the OPEC Summit and in the International Tourism Trade Fair (FITUR) in Madrid.

2002. Economic growth of 30.4%. GDP per capita: $3,482. Population data: 498,144 inhabitants + 110,000 abroad.

2003. Economic growth of 16%. Beginning of a period of strong economic expansion.

2004. Economic Conference (19-22 January). Repsol returns to Equatorial Guinea. The economist Carmelo Nvono-Ncá is elected Chairman of the Official Hispano-Equatorial Guinean Chamber of Commerce and Industry (COCIHEG).

2006. Creation of the National Bank of Equatorial Guinea (BANGE), the first bank with Guinean capital, which is predominantly private.

2007-2018. Consolidation of growth, with rises in production and exports of hydrocarbons. In 2018, Malabo, the capital of Equatorial Guinea, is selected by the Committee of Ambassadors of the 79 countries of the African, Caribbean, and Pacific Group of States (ACP) as the headquarters of the Office for International South-South and Triangular Cooperation, and an information hub for development.

3. Spanish in Angola, Mozambique, Sao Tome and Principe, and Guinea-Bissau

The spread of Spanish in these four Portuguese-speaking countries of Sub-Saharan Africa has undoubtedly been influenced by the well-established and uninterrupted presence of Cuba since the 1970s, through Cuban books, publications and instructors and personnel. They are present in the military, in education, in healthcare and in the administration. Similarly, exchange programmes, and travel to Cuba by leaders and young people from these countries to train or study, have also been a determining factor, spreading the Spanish language, or the mix of Spanish and Portuguese (known as *portoñol*) that is so widely understood in these nations. Added to this is the influence and reach of the Spanish and Latin American audio-visual sectors and general-interest media, which explain the Spanish language's general position of functional bilingualism among inhabitants of these countries in the international trade and business spheres. Furthermore, the Spanish language is an official language of the United Nations, alongside English, French, Chinese, Russian, and Arabic.

Another factor that influences the commercial and economic reach of Spanish in these countries is their recognition of the Saharawi Republic, and reception and exchanges between these nations and the Republic, through writers such as Bahia Mahmud. This is a republic that is recognized by more than 60 countries around the world, and by the African Union, of which it is part and of which it has held the Deputy Chair. In addition, 12 October has been a national holiday since 1976, and Spanish is recognized as an official language in its Constitution, together with Hassānīya Arabic.

Moreover, as part of its strategic and diplomatic rapprochement with France and with the French-speaking world, Equatorial Guinea decided to take the symbolic step of adding French as an official language. As late as 2014, as part of this drive to extend its international bonds and links—in this case with Portuguese-speaking countries—the nation also symbolically added Portuguese as an official language.

Spanish on the language map of the Lesser Antilles

María Asunción GÓMEZ
Florida International University

The distinguishing features of the Caribbean Islands have been forged by a complicated colonial history and an extraordinary racial diversity, which is manifest in the religious and cultural syncretism that characterizes the region. This racial and cultural hybridity is reflected in an entangled language map, with different official and national languages in each country, as well as a complex variety of creole languages, the study of which constitutes a challenge for linguists. This chapter does not seek to enter into the multiple discussions and controversies on the origin and development of the creole language, but to explore the place of Spanish and of Papiamento (the creole language with an Iberian lexical base) in the non-Hispanic Caribbean.

The Caribbean plays a key role in the global economy, not only as an attractive destination for millions of tourists, but also because it is increasingly becoming a recipient of foreign investment flows, primarily from Canada, the USA and Europe (especially from Spain) (Silva Fernández, 2007: 220).[57] Given its strategic geographic location—halfway between the United States and Latin America—the economic importance of the use of Spanish in this area is unquestionable. Even though it is not easy to determine the economic importance of a language, different factors must be taken into account: the number of speakers, its geographic extension, the number of countries in which it is official, the human development index of its speakers (which combines educational level, life expectancy and per capita income), the trade capacity of the countries where that language is official, its literary and scientific heritage, and its role in multilateral diplomacy (Fernández Vítores, 2017: 27). The huge economic potential of Spanish is inextricably linked to demographics because more than 477 million people speak it as their mother tongue, and it has been proven that economic transactions and trade exchanges multiply when people belong to the same language group (Fernández Vítores, 2017: 27). This is why the governments of the non-Spanish-speaking Caribbean countries are taking steps to make Spanish their first foreign language. This interest in promoting Spanish becomes even more relevant if we bear in mind that some of these islands still preserve traces of the Spanish cultural heritage left by centuries of Spanish colonization, as in the case of the Republic of Trinidad and Tobago.

It is well known that Spanish is the official language of countries such as Cuba, Puerto Rico and the Dominican Republic. However, it is often forgotten that it is the national language of Belize; that increasingly hispanicized versions of Papiamento are spoken in Curaçao, Aruba and Bonaire; or that in Trinidad, the signage of all public spaces is bilingual (English-Spanish), and its population, almost entirely English-speaking, celebrate Christmas to the rhythm of *parang* (a derivation of the Spanish *parranda*, or "revelry"), the music of the Venezuelan labourers who settled on the island during the heyday of the cocoa plantations. Let us therefore discuss the situation

[57] Spain's protagonism in this area is due to political and cultural factors, but also to economic factors, because it is becoming the top foreign investor in sectors such as energy and tourism (Silva Fernández, 2007: 220).

of Spanish in the Lesser Antilles, more specifically in Trinidad and Tobago, where the Government expects the entire population to be bilingual by 2020, and in Curaçao, Bonaire and Aruba, where Papiamento is an official language, together with Dutch.

Trinidad and Tobago

Trinidad is currently an independent State together with Tobago and other islets that are very close to Venezuela's north-eastern coast. Trinidad is the principal island, where there is the most trade and industry, whereas Tobago is focused on tourism. The population of the Republic of Trinidad and Tobago is under one and a half million inhabitants, but it has a solid economy, focused on the energy sector, which accounts for 40% of its GDP and 70% of its foreign currency revenues. It must also be highlighted that one quarter of the gas produced in South and Central America and in the Caribbean comes from Trinidad and Tobago, which is also the leading exporter of hydrocarbons in the entire region.

This Caribbean republic, with an area of only 5,130 square km, is one of the world's smallest countries as well as one of the countries with the greatest racial and cultural diversity. Even though English is the official language, as well as the language of prestige, Trinidadians communicate with each other in a creole with a predominantly English lexical base, but peppered with words originating from French, Spanish, and different African and indigenous languages. In addition to this Trinidadian creole, called "broken English" by its own speakers, the island is home to a rich mélange of languages that includes speakers of Spanish, *Patois* (French-speaking creole), Hindi and Chinese. Despite the fact that in recent years the Government of the Republic of Trinidad and Tobago has sought to promote the learning of Spanish, it is currently spoken fluently by only a small part of the population. Before explaining why the language legacy of three centuries of Spanish colonization has disappeared, let us briefly describe the key moments in Trinidad's history and Spain's influence on the island.[58]

Christopher Columbus discovered Trinidad during his third voyage, specifically in 1498, and named it in honour of the Holy Trinity. During the colonial period, Spaniards did not make much effort to populate this small island, develop its agriculture or exploit its natural resources. However, the Spanish Crown was interested in maintaining control over Trinidad, given its strategic location. Close to the continent, it was key to military manoeuvres and a prime location for the slave trade. However, Spain was not the only European power to become aware of the island's immense potential. Indeed, throughout the 17th century it was frequently invaded by other European powers, namely the English, the Dutch and the French, who, like the Spaniards, had no intention of populating or exploiting it, but of having military control over it. In fact, in the early 18th century the island's population was insignificant. In 1702, the governor of Trinidad provided the Spanish Crown with census information that offers us an insight into the marginal status of the island within Spain's colonial enterprise. Only 60 Spaniards and 1,500 natives were included in Trinidad's four *encomiendas* [grants offered by the Crown to conquistadores, soldiers, officials, or other individuals equipping them with a specified number of indigenous labourers living in a particular area], all of them in the north of the island (Arauca, Tacarigua, San Juan, and Caura). One can imagine that the indigenous population knew the Spanish language and customs, but there is no record of

[58] I will leave Tobago aside in order to focus on the history of Trinidad, because this is the larger of the two islands, and it is where the Hispanic presence and the persistence of Spanish are most evident.

the extent to which they had assimilated the colonizers' culture (Morales Padrón, 2011: no page number).

The growth of its population and the expansion of its trade occurred in the late 18th century, partly due to the good administration of Spanish governor Don José María Chacón, who was in charge of its Government from 1784 to 1793, a period known as Trinidad's first "golden decade": "with the arrival of Chacón, the island became a province with all the requirements to be considered as such. The growth of the island was spectacular" (Andreo García, 1991: 191). Said growth was made possible by the Royal Charter on Population and Trade, proclaimed by King Charles III in 1783, which allowed trade exchanges with the neighbouring foreign colonies and promoted the settlement of immigrants, granting land to any foreign Catholic who decided to settle in Trinidad and swore loyalty to the Spanish Crown, and exempting them from taxes for a ten-year period. This is how a considerable number of colonists, slaves and free *mulattos* came to Trinidad from neighbouring islands (Martinique, Saint Lucia, Grenada, Guadeloupe, and Dominica), and even from Haiti. [59] Incentives to immigration and the concessions set forth in the Royal Charter were increased in subsequent provisions, thus enabling the island to experience unprecedented economic transformation.

This resulted in a considerable increase in commercial transactions, which sparked Britain's interest in taking possession of a territory which, as explained by Sevilla Soler, had practically been a no man's land despite Spain's nominal sovereignty (196). British traders settled in Port-of-Spain, and made the city a trading hub of great strategic importance in the Caribbean. Once the island had become included in its trading circuit, the British Government soon took advantage of the opportunity afforded by an armed conflict—which had stemmed from the Treaty of San Ildefonso[60]—to seize Trinidad from Spain in 1797 and begin an unprecedented economic expansion, especially by establishing large agricultural plantations. Trinidad went from having a subsistence economy to becoming an exporter of cotton, sugar cane, and coffee. Thus began a period of bonanza, although with a peculiar social and legal situation because, despite being a British colony, the laws were still Spanish and most of the population, especially in rural areas, was of French origin.[61]

The mixture of races and cultures intensified following the abolition of slavery in 1833. In the absence of slave labour, the British Government not only succeeded in attracting Chinese and Portuguese immigrants, and serfs from the East Indies, but also Venezuelan labourers, especially during the fifty-year boom experienced by the cocoa industry (1870-1920). During this period, the cultivation and production of cocoa had grown exponentially, and in the second decade of the 19th century, cocoa plantations accounted for one third of the arable land (Moodie-Kublalsingh 1-8).[62] Venezuelan labourers had started to emigrate to Trinidad in the early 19th century, attracted by the working conditions and the salaries offered at the cocoa plantations. However, this

[59] For an exhaustive study on Trinidad's economic development in the late 18th century, see the study by Sevilla Soler, *Inmigración y cambio socioeconómico en Trinidad*, 1783-97.

[60] Spain signed the Treaty of San Ildefonso in 1796, thus establishing a military alliance with France, in order to protect Spain's fleet from British attacks during transatlantic voyages.

[61] Even though British occupation brought about an increase in population and an expansion of agricultural infrastructure, in the 19th century Trinidad was still one of the least populated Caribbean islands. For more information about the period of British occupation in Trinidad, see Bridget Brereton's *A History of Modern Trinidad (1783-1962)*.

[62] All of the information about the Venezuelan labourers who settled in Trinidad in the late 19th century has been taken from the book by Sylvia Moodie-Kublalsingh. To date, this is the only monograph on what were known as the *cocoa panyols*.

Venezuelan workforce was not always welcome by plantation owners, most of whom were British and French. When, in 1842, W. H. Burnley chaired a committee to address the plantation's labour shortage, he expressed his apprehension and mistrust of these "mixed-race labourers" (*mestizos*, *mulattos*, *pardos*, *zambos*), whom he considered dangerous, and even described as a group of criminals (Moodie-Kublalsingh 4).[63] This was probably due to a certain fear that these labourers would introduce revolutionary and secessionist ideas into the British colony. Whatever the reasons, this initial apprehension gradually faded and the value of this workforce prevailed, as did their skills and know-how in cultivating cocoa. Therefore, these Venezuelan workers soon became the indispensable workforce that the colonists needed for their plantations to flourish.[64]

Even though Trinidad was initially a temporary work destination, it soon became a permanent home to many immigrants, especially after the mid-19th century. These Spanish-speaking peasants (labourers and *conuqueros*) were known as *cocoa panyols*, or simply *panyols*, a name with negative connotations, at least initially.[65] They constituted clearly defined communities, relatively isolated from the rest of the Trinidadian population; thus, they were able to preserve their language and culture without great difficulty. In certain areas, such as the Caura Valley, in the north of the island, the population interacted exclusively in Spanish and followed Hispanic traditions. As we can see, the *cocoa panyols* differed from the rest of the Trinidadian population because of the language they spoke, the work they carried out, and even their racial and cultural origins, which included Hispanic, indigenous and African elements. They were famous for their expertise in cultivating cocoa, and felt secure in their environment, working as labourers in the large plantations, and even cultivating their own *conucos*. The *cocoa panyols'* social status was determined by their position in the cocoa culture. Logically, a labourer's highest aspiration was to become a *conuquero*, that is, the owner and farmer of a small cocoa plantation.

With the decline in plantations (from 1920 to 1930) and the rise in the extraction of natural gas and oil (especially since the 1950s), the disintegration of these rural Hispanic communities was inevitable. Moreover, the Caura Valley population was forced to relocate to the Arouca Valley (Lopinot and Las Cuevas) in the early 1940s, following the colonial government's decision to build a dam. The *cocoa panyols* had already begun to lose their cohesion and self-sufficiency as a Hispanic community within Trinidadian society, but the building of the dam was the final blow that put an end to their community, by severing the links that had made it possible for Spanish to be preserved in this area.[66]

Even though they have practically disappeared as a community, the *cocoa panyols* have left the imprint of their culture on Trinidadian folklore and traditions. A good example of this can be found in the increasingly popular *parang* bands, whose music accompanies Trinidadians from mid-November to early January in their Christmas

---

[63] In the Spanish colonies in the Americas, the descendants of indigenous Americans and Africans were known as *zambos*. When European ancestry was added to this racial mix, the term used was *pardos*.

[64] Plantation owners thus recognized that Venezuelan labourers were valuable workers and pioneers in establishing new plantations (Moodie-Kublalsingh 4).

[65] These labourers, who were mostly illiterate, constituted a rural community that had little in common with the Venezuelan professionals who had gone into exile at different moments of the 19th century, and who had settled in Port-of-Spain.

[66] Thus, the name *cocoa panyols* began to disappear, and in the Trinidadian society of today, "the Spanish" are everyone for whom Spanish is a mother tongue or heritage language, regardless of their origin.

celebrations.[67] This is a Hispanic tradition, similar to the Mexican *posadas* or the Puerto Rican and Dominican *aguinaldos*. A group of people goes from house to house, singing carols and other typically Venezuelan Christmas songs such as *guarapos* and *despedidas*. In the purest form of *parang*, the hosts follow certain greeting and farewell rituals, and also offer beverages and food, such as *pastelles*, a typically Hispanic dish similar to tamales. Some of the string instruments used in the *parang* bands, such as the *cuatro*, are of Spanish origin, whereas the percussion instruments, such as maracas and drums, come from the indigenous American and from the African traditions, respectively. Thus, *parang* is a blend of cultures and traditions, a reflection of Trinidad's identity. Moreover, Trinidad's inhabitants have adopted this Hispanic tradition, which was already a hybrid, and have given it yet another twist by creating *soca parang*, fusing *parang*'s traditional rhythms with those of *soca* (a Trinidadian musical genre deriving from calypso), and replacing the Spanish lyrics with lyrics in English. The typically Hispanic religious figures and Christmas themes disappeared along with the Spanish lyrics, and were replaced by cultural icons from United States culture.[68]

Soca parang is a good example of how the English-speaking culture is becoming prevalent in the island, despite the Government's efforts to disseminate Spanish and to promote bilingualism. Although the islands of Trinidad and Tobago were united in 1962—becoming established as a country and declaring their independence from the United Kingdom—English remains the predominant language. However, its proximity to Venezuela and the Spanish-speaking American countries has enabled it to forge close commercial ties with these countries, which the Government of Trinidad and Tobago has sought to strengthen in recent decades by promoting the teaching of Spanish. In 2004, the "Spanish as the First Foreign Language" (SAFFL) initiative was launched, and the following year, the Ministry of Trade and Industry joined the Ministry of Education to found the Secretariat for the Implementation of Spanish (SIS).[69] Its slogan—"Connecting cultures. Creating opportunities"—indicates a twofold cultural and economic objective, and its aims are to promote Spanish, increase Latin American investments, and thus contribute to the nation's growth and development. The organization's website explains that, when the SIS was created, it was expected that Port-of-Spain would bid to host the headquarters of the Free Trade Area of the Americas (FTAA), which in the end never came to fruition.[70] Even though the FTAA did not come to pass, the Trinidadian Government considered that the SIS still had an important role to play in fostering trade, educational and cultural relations with the Spanish-speaking countries of Latin America. The SIS's objectives are as follows:

1. To facilitate a new learning environment through which the citizens of Trinidad and Tobago will learn and effectively utilize Spanish as the First Foreign Language (SAFFL) by the year 2020.

2. To promote fruitful and effective intercultural dialogue.

---

[67] For more information on *parang*, see the book by Mark Brill, *Music of Latin America and the Caribbean*.

[68] *Parang* has become so popular in recent years that there are now *parang* competitions and festivals. Daisy Voisin, known in Trinidad as the "Queen of *Parang*", is probably the best-known *parang* performer today.

[69] According to Guillermo García Morales, the largest Hispanic community in Trinidad is the Venezuelan community, with more than 10,000 registered residents, a number which would skyrocket if we included non-registered residents, students who have come to practice English, and tourists (143).

[70] 18 of the 34 member countries of the FTAA are Spanish-speaking.

3. To promote public awareness and support for the Spanish as the First Foreign Language (SAFFL) initiative.[71]

The website also offers a brief summary of the strategic importance of Spanish in the internationalization of Trinidad and Tobago, and presents the language as a key driver for trade and a generator of employment, especially in the service industry and in the hospitality industry. The SIS aims to raise awareness among Trinidadians that mastering Spanish is key to accessing the extensive Latin American market (515 million inhabitants in more than 44 countries) and, therefore, a guarantee of success.[72]

Vision 2020, the Trinidadian Government's strategic plan, sets forth bilingualism as its ultimate goal, but this ambitious objective is only an illusion. An article published in Spain's newspaper *El País*, on the occasion of the visit of King Juan Carlos I to Trinidad in February 2009, offers disappointing figures: "Asking Trinidadians whether they speak Spanish is useless. Officially, 5% of the population of the islands of Trinidad and Tobago speak Spanish (approximately 6,500 out of a population of 1,300,000), but the Republic's inhabitants themselves recognize how difficult it is to find them, when they are asked".[73] The article clearly reveals the gap between the Government's grandiose projects and the reality of Trinidad's society. An official report of June 2010 acknowledged the failure of the enthusiastic campaign promoted by the SIS, which for some time even offered free Spanish classes as part of the "Vamos a aprender español" [Let's learn Spanish] initiative. It reveals the mistakes made, which, according to Guillermo Molina Morales, ranged from scarce resources to the lack of a well-defined plan (with specific and measurable goals), in addition to the excessive ambition of the project (2009: 143).

Nearly ten years later, the situation has not improved. According to *El español: una lengua viva. Informe 2017* [Spanish: a living language. 2017 Report], published by Instituto Cervantes, only 4,000 Trinidadians have a native command of Spanish, and 66,401 of them have limited Spanish language skills (Fernández Vítores, 2017: 7). The comments made ten years ago by Jesús Silva Fernández, Spanish Ambassador in Jamaica, about the presence of Spanish in the non-Hispanic Caribbean, are still relevant today in the specific case of Trinidad and Tobago:

> Despite the influence and acceptance of Spanish in the English-speaking Caribbean, its situation, in terms of resources available for its teaching and dissemination, is much more precarious than in other regions of the world, and does not reflect the strength of and demand for the language in the area. In fact, it could be said that almost everything still remains to be done: there are hardly any solid Spanish departments in the region's universities, which limits their capacity to train teachers; there are hardly any active associations of Spanish-language professionals (teachers, Hispanists, translators and interpreters, tourist guides) which makes it difficult to channel resources and support measures to said professionals; there aren't even any private Spanish language schools, and thus most of the demand cannot be met; there is a lack of resources, specialized libraries, TV channels in Spanish, and studies on the status of Spanish in the area; and given that the DELE examinations are not offered, the only recognized qualifications are regional academic diplomas from institutions inherited from the British colonial past, of questionable quality. In sum, there is a striking gap between demand and supply. (Silva Fernández, 2007: 222).

[71] These are the objectives stated by the SIS on its website. As an anecdote regarding said website, it is significant that it features the Mexican *sombrero* as the only cultural icon representing all of the Spanish-speaking countries. This small detail indicates a lack of sensitivity towards—or maybe an unawareness of—Hispanic cultural diversity in Trinidad.

[72] The SIS website compares the 7.9 trillion dollar GDP of UNASUR (Union of South American Nations) with the 64.8 billion GDP of CARICOM (Caribbean Community).

[73] Ironically, despite the good intentions and the words of support from King Juan Carlos I, who promised that the Spanish Government would help to the extent of its possibilities, the economic crisis in Spain made it impossible for Spanish assistance to be provided.

In the case of Trinidad and Tobago, Spanish has been a mandatory subject in primary schools since 2005, but in practice it is only taught in some of them.[74] It is also a mandatory subject in the first three years of secondary school, and an elective in the last four. The University of the West Indies (UWI) offers undergraduate and postgraduate studies in Spanish, and the University of Trinidad and Tobago (UTT) offers Spanish teacher training for primary schools. In addition to these two public universities, private institutions such as the University of the Southern Caribbean (USC) offer a few Spanish courses.

Despite the promises and good intentions of the governments of several Hispanic countries supporting Trinidad and Tobago in their unrealistic expectations of reaching the target of bilingualism by 2020, help has been quite limited. For example, the Spanish Agency for International Development Cooperation (AECID) stopped sending Spanish lecturers in 2013 (until then there had been two lecturers at UWI and one in UTT), and Instituto Cervantes never opened a centre in Port-of-Spain, even though it had once considered the possibility. The most successful exchange programmes are still being held with Colombia, Argentina, and, especially, Venezuela, through the Venezuelan Institute of Culture, which offers free Spanish courses and organizes different activities relating to Hispanic culture (Molina Morales, 2013: 146).

Spanish is far from being a commonly spoken language in Trinidad and Tobago. Even though Spanish is recognized as an economic asset and an important part of the country's cultural and historical heritage, the fact is that only a tiny part of Trinidad's population has been able to acquire the necessary language skills to communicate in Spanish. This is partly due to the scarcity of resources allocated to teaching the language, and to the shortage of teachers who are adequately qualified to teach Spanish. It is probably also because Spanish is not a language of prestige in Trinidad and Tobago, as it is associated with migrants from the lower classes.[75] That is why the title of the above-mentioned article in *El País*—"El español, un fósil de 500 años en Trinidad y Tobago" [Spanish, a 500-year-old fossil in Trinidad and Tobago]—is still accurate today.

Aruba, Bonaire and Curaçao

Unlike Trinidad and Tobago, where English is clearly the language of prestige, the language situation in Aruba, Bonaire and Curaçao (popularly known as the "ABC islands") is much more complex. Here, we find an eminently multilingual society which, in general, can communicate fluently in four languages: Papiamento, Dutch, English and Spanish.[76] Papiamento is the language with the largest number of native

[74] Molina Morales provides information about the measures taken in 2005 by the Government of Trinidad and Tobago to ensure that Spanish is offered at primary schools: "In that year the Government organized teacher training workshops in which approximately 70 schools participated, but not all of them ended up offering Spanish classes" (144).

[75] According to the information given by Michelle Reis in her article "Vision 2020: The Role of Migration in Trinidad and Tobago's Plan for Overall Development", most low-income immigrants come from Venezuela, Colombia and the Dominican Republic (10).

[76] According to the data published by Instituto Cervantes in *El español: una lengua viva. Informe 2017* [Spanish: a living language. 2017 Report], 13,710 Arubans speak Spanish as a mother tongue at home, and 69,354 of them speak Spanish at different levels, either because they are speakers of Papiamento, or because they have studied it as a foreign language at school. This report does not give specific data on Curaçao and Bonaire, because it includes them in the Netherlands Antilles, which have 10,699 native speakers of Spanish (most of them resident in Curaçao), and 120,000 people with limited Spanish language skills (2017: 7).

speakers (approximately 85% of the population), and in fact it has been the national language of these three Caribbean islands since the 17th century. However, it has had to wait more than 300 years to share the status of official language with Dutch, a recognition that was granted in Aruba in 2003, and in Curaçao and Bonaire in 2007. Spanish has been preserved mostly due to the close economic ties that the islands' population has with Venezuela, especially since the 19th century, and also because it can be understood easily by speakers of Papiamento, especially on the island of Aruba.[77] In turn, English gained ground in the first decades of the 20th century, following the discovery of oil deposits in Lake Maracaibo and the subsequent establishment of refineries in Aruba and Curaçao.[78] We will now describe the historical circumstances that contributed to such a peculiar language situation.

Located just a few kilometres from Venezuela's north coast, the ABC islands are part of the Netherlands Leeward Antilles.[79] Curaçao is the principal island, with an approximate population of 140,000 inhabitants, followed by Aruba and Bonaire, with 60,000 and 10,000, respectively. In 1499, when Alonso de Ojeda disembarked on these islands, he called them "Islands of Giants" because of the height of the Caiquetio indigenous peoples who inhabited the islands, as well as Tierra Firme (the mainland province, today's Paraguaná Peninsula), all of whom spoke the Arawak language. The Spanish Crown took possession of Curaçao in 1527, but, as was the case with Trinidad, its occupation and exploitation of the island was very limited. In fact, in several documents from the period, the *conquistadors* referred to Curaçao, Bonaire and Aruba as the "useless islands", due to their aridity and their lack of precious metals. When the Dutch took possession of this archipelago (Bonaire in 1633, Curaçao in 1634, and Aruba in 1636), they only found a few dozen Spaniards, who relocated to Tierra Firme (today's Venezuela), accompanied by the indigenous peoples who did not want to submit to Dutch rule.[80]

In 1621, the Dutch Parliament had granted the Dutch West India Company (WIC) monopoly on the slave trade in the Americas, and Curaçao had one of the Caribbean's best natural ports. Therefore, the WIC soon became established on this island and made it its hub. Slaves were brought to Willemstad (today Curaçao's capital city) and from there they were shipped to South America and other Caribbean islands. In the mid-17th century, a group of Sephardic Jews settled in Curaçao and found their place in the costly slave trade. These Sephardim, who had initially left Spain and Portugal fleeing from the

[77] There are different lexical and phonemic variants of Papiamento in rural and urban areas, which do not prevent communication between Papiamento speakers. Likewise, Papiamento in Aruba is more hispanicized than that of Curaçao and Bonaire. Attempts to create a standard version of Papiamento have led to two spelling systems: the spelling system in Curaçao and Bonaire is phonemic, whereas in Aruba it has an etymological base, deriving from Spanish, and therefore it is easier for Spanish speakers to understand.

[78] Aruba's oil refineries, whose activity had been interrupted in 2012, resumed their operations in 2016. The authorities of the Venezuelan and Aruban governments formalized Citgo Aruba's launching of operations in October 2016. http://www.reporte1.com/aruba-reactiva-refineria-de-petroleo-que-operaran-citgo-y-pdvsa/

[79] In the 1980s, the Netherlands Antilles began a dissolution process (see Broek, 2011). In 1986, Aruba seceded from the Netherlands Antilles and became an autonomous constituent country of the Kingdom of the Netherlands. In recent years, Curaçao and the Dutch part of Sint Maarten followed in Aruba's footsteps and also became autonomous constituent countries, under the sovereignty of the Kingdom of the Netherlands.

[80] The indigenous population was not very numerous. It must be recalled that in 1513, the indigenous peoples of these islands had been taken to Hispaniola to work in the copper mines, and many of them had not returned. It seems that the few indigenous people who had remained on the ABC islands were hardly Christianized, because few priests moved to these islands during the Spanish occupation, which lasted less than a century (1527-1634), (Felice Cardot, 1973: 46).[80]

Inquisition, had first settled in Amsterdam and in northern Brazil, which had been in Dutch hands since 1630. During the more than two decades that the Sephardic Jews lived in Brazil, they became allies of the Dutch, who were much more tolerant about religious affairs than the Portuguese, so when the Portuguese retook control of Brazilian lands, the Jews joined the Dutch on their expedition to Curaçao.

The Sephardim spoke different languages of Iberian origin—Portuguese, Spanish, Galician, Judeo-Portuguese, Judeo-Spanish (Holm, 2000: 77)—that were mutually intelligible and served as the foundation for the creation of a pidgin enabling communication between people belonging to three different ethnic groups (Africans, Dutch and Sephardic Jews). The slaves spoke different West African languages, and the Dutch could understand Portuguese and Spanish.[81] Thus, these two languages contributed to the creation of Papiamento, one of history's most important creole languages.[82]

Although the origin of Papiamento remains debatable, a great many scholars defend the polygenetic theory, according to which this creole was born in Curaçao in the heyday of the slave trade, between 1650 and 1700, and later spread to the islands of Aruba and Bonaire.[83] According to certain linguists, there was a primitive jargon based on a hispanicized indigenous language (Ferrol, 1982: 21), and it was strongly influenced by Portuguese and the different Iberian-based dialects spoken by the Sephardic Jews who had moved to Curaçao. In time, according to Van Balen, Papiamento became hispanicized: "The subsequent isolation of Portuguese society, very small in a Spanish-speaking environment, led to a notable, growing Hispanic influence on Papiamento [...], a process that ended up accelerating, because the Sephardim in Curaçao abandoned Portuguese in favour of Papiamento in local interactions, and of Spanish in international relations" (cited in translation in Ferrol, 1982: 22).

By the 18th century, Papiamento had become established as the *lingua franca* of Curaçao, and gradually spread to the other islands (Jacobs, 2012: 15).[84] Since the mid-19th century, especially since the abolition of slavery in 1863, a great many works have started to be published in Papiamento: "Stories and tales, poems, occasional verse, essays, novels, pamphlets, songs and dialogues for staging, that with an enthusiastic reception were or have been labelled as 'literature'. These literary texts testify how the people looked at themselves and their fellow islanders of various ethnic groups, their defective past, emerging developments and promising ideals, at visiting outsiders, at the outside world in general, and their mother country, the Netherlands, in particular" (Broek, 2011: 60).

---

[81] We must also recall that the southern area of the Netherlands was still under Spanish rule at that time.

[82] Arising from a practical need for trade languages, the creole languages, which were initially predominantly spoken languages, historically occupied a lesser position than the prestigious European literary languages (English, French, Spanish, Dutch, etc.), reflecting the highly hierarchical nature of the colonial world. Caribbean creoles take certain phonemic and grammatical features from African languages, but their lexicon comes, to a great extent, from European languages.

[83] According to the monogenetic theory, it is a Portuguese proto-creole that evolved among slaves in West Africa, arising from their need to communicate with each other and with the Portuguese slave owners. For the proponents of this theory, this is the only way to explain the parallels existing between several creole languages. However, other linguists argue that these parallels have an African, not a Portuguese, foundation.

[84] The first publications in Papiamento appeared in the 18th century, and the first newspapers in that language started to appear in the 19th. The first of these, *Civilisadó* (1871-75), was a vehicle for literature written in Papiamento, and published serialized didactic novels, a practice carried out by subsequent newspapers, especially after 1920.

Over the years, Papiamento has acquired increasing social prestige, and today it is the language used in Parliament, in official publications, and in the media. Most radio and TV stations on the island use Papiamento, and there are abundant publications of all kinds in this language.[85] Moreover, in 1986 it was introduced as a subject in primary schools, and it is likely to dislodge Dutch, which until the 1990s was the only teaching language in schools. Today, Papiamento is probably the Caribbean's most stable creole language, and its number of publications and speakers continues to grow. However, some believe that, despite this stability, its speakers have an underlying sense of inferiority with regard to those whose mother tongue is Spanish, English or Dutch (Carroll, 2016: 120).[86]

In addition, Papiamento has been a hallmark of national identity for centuries. In an interview with Kevin Carroll, author Ramón Todd Dandardé observed that even the first Dutch inhabitants of Curaçao used Papiamento to exclude newcomers to the island, which, to a certain extent, continues to happen today. The Dutch who arrive on these islands, whether to spend a holiday or to stay for a longer time, and do not speak Papiamento, are treated as foreigners (Carroll, 2016: 121). Furthermore, when thousands of Americans moved to Curaçao and Aruba around 1920 to take up positions in the oil companies, it was believed that English would become the area's *lingua franca*. However, the inhabitants of this Caribbean archipelago held on to Papiamento and did not let English take over. Similarly, when the oil boom was over and the economy of these islands started to develop the tourism industry in the late 20th century, Spanish assumed a predominant position. Thousands of workers in the hospitality industry (especially Venezuelans) moved to the islands, and Spanish became a mandatory subject in secondary schools. Once more, Papiamento remained the national language and the language of daily use.[87]

However, the inflow of Spanish-speaking immigrants is undoubtedly accelerating the decreolization of Papiamento, a phenomenon that has been taking place for decades, as Wood observed five decades ago: "One remarkable aspect of the observable socio-linguistic fact of the Hispanization of Papiamentu is that it is occurring despite the fact that Curaçao ceased to be a Spanish possession in 1634 and that it has been a Dutch possession—with very brief periods of English rule—since that time" (Wood, 1972: 857). Moreover, Wood argues that the social prestige enjoyed by Papiamento—especially the most hispanicized versions, used in urban areas—is due, precisely, to its closeness to a language of the stature of Spanish.[88]

Papiamento and Spanish have coexisted on the island throughout history, and that is why it is no surprise for the language that has historically enjoyed greater cultural prestige and a stronger international profile to have influenced the creole language. Broek observes that, even though Dutch has been the official language since the 17th

[85] Attempts have been made to standardize the language, creating new Papiamento dictionaries and grammars.

[86] In 1997, Appiah and Gates made the following observation about Papiamento and the future of creole languages in the Caribbean:

> This Spanish-related creole has not only a rich literature in many genres but also radio, TV and a thriving popular press. It remains to be seen if creoles will survive into the next century as autonomous languages of print and learning, or be relegated to oral and popular culture. The elites who dominate most creole speaking countries do not always promote creole literacy, and many creole speakers themselves have distorted, self-deprecating images of their own languages. (1997: 158-9).

[87] See the thorough study by Kevin Carroll on the presence of Papiamento in these islands.

[88] Here, it is worth recalling the following information provided by Instituto Cervantes on the huge economic power of Spanish: "Spanish is among the world's top five languages in number of speakers, in number of countries where it is official, and in geographic extension" (Fernández Vítores, 2017: 27).

century, "literacy in Spanish became widespread among the elites and civilians, and therefore became a much better-known language than Dutch. The latter only began to gain clout throughout the 20th century" (Broek, 2011: 63). In a comprehensive book titled *Curazao hispánico. Antagonismo flamenco-español* [Hispanic Curaçao. Flemish-Spanish antagonism], Carlos Felice Cardot offers a thorough historical account, describing the close ties between the island and the Spanish-speaking countries: first Spain, during the nearly one hundred years in which it ruled the island, and later, Venezuela. During the 18th century, "Spanish was the language spoken by all, and Catholicism the religion of most of its inhabitants. And the status of each was undoubtedly determined by the closeness and influence of Venezuela, albeit spontaneously, and not resulting from guided and purpose-driven action" (Felice Cardot, 1973: 463). This close contact between Curaçao and Venezuela was further strengthened in the early 19th century: "The natives, thanks to the free trade established by Spain in favour of Venezuela (1789), intensified relations with Curaçao in a normal, lawful manner" (Felice Cardot, 1973: 463).

Felice Cardot also highlights the fact that, throughout the 19th century, Curaçao welcomed a considerable number of refugees who had to flee to the island while they were fighting for Venezuela's emancipation: "The island became a haven ensuring the freedom and life of Venezuelan politicians and leaders [...] Prominent Venezuelan intellectuals became permanent or occasional collaborators in the island's broadsides, and took part in its cultural and civic jousts" (465). He also pointed out that thanks to the establishment of Venezuelan publishing houses in Curaçao, such as A. Bethencourt e Hijos, Venezuelan writers were able to publish books that were banned in Venezuela.

Today, Venezuelans still go to Aruba and Curaçao seeking work and political asylum. In the past two years, the collapse of Venezuela's economy has forced many to take to the sea on rafts, and some have lost their lives in an attempt to reach the shores of the ABC islands. Faced with an increasing number of undocumented persons, the islands' authorities are responding with deportations and greater coastal surveillance.[89] Relations between the two countries deteriorated in January 2018, after Venezuelan President Nicolás Maduro announced the closing of the borders with Curaçao, Aruba and Bonaire until the islands' governments put an end to the smuggling and criminal organizations which, he assured, are in control of the region and are harming Venezuela's economy.[90] In response to this situation, the Bolivarian Society of Curaçao, in a communiqué published on 22 February 2018 in the Spanish language newspaper *Noticias Curazao*, called on the Venezuelan and the ABC islands' authorities to normalize trade relations between the two countries. Moreover, Venezuelan immigrants are requesting special treatment given the critical situation that their country is currently in: "We are not asking the authorities of the ABC islands to allow free entry to every Venezuelan seeking to work in their territories, because we are aware of the limitations of their economies, given their size. What we are asking for is a grace period for those who have already entered, and respect for their human rights, while there is still a famine in Venezuela."

[89] An article published by *BBC World* in February 2018 gives telling data about Venezuelan immigration to the ABC islands. In 2016, 60 Venezuelans were apprehended on the high seas, and in 2017, the number rose to 315. In 2017, more than 1,200 persons were deported to Venezuela. http://www.semana.com/mundo/articulo/la-arriesgada-travesia-de-los-balseros-que-huyen-de-venezuela-para-vivir-como-ilegales-en-la-isla-de-curazao/556305

[90] See the article "Aruba y Curazao piden cooperación a Países Bajos por bloqueo de Maduro" [Aruba and Curaçao ask the Netherlands for cooperation against Maduro's blockade] (EFE), published on 9 January 2018 in http://www.elmundo.com/noticia/Aruba-y-Curazao-piden-cooperacion-a-Paises-Bajos-por-bloqueo-de-Maduro/365511.

Just a few decades ago, thousands of affluent Venezuelans would arrive in Aruba and Curaçao as tourists, but today they are arriving as immigrants. Spanish, a language that used to be associated with educated and wealthy people, is nowadays the language of impoverished and undocumented immigrants. This situation will undoubtedly affect the ABC islanders' perception of Spanish, but we trust that the language will continue to be a sufficiently important economic asset, and that the inhabitants of these Caribbean islands will continue to learn it in secondary school and to speak it fluently.

It is well known that language is a key element of a country's human and social capital, and that language and culture policies are inextricably linked to economic issues. Antonio Muñoz Molina once said that the enemy of Spanish is not English, but poverty. This is especially relevant in the case of Trinidad and Tobago, Curaçao, Aruba and Bonaire, islands that are so close to Venezuela and so heavily influenced by that country's unfortunate political and economic situation. It is difficult to foresee the role that Spanish will play, and how widespread it will be, in these islands in the near future. What does seem undeniable, however, is that there is great potential for strengthening its presence in diverse educational, cultural and economic spheres.

Works cited

ANDREO GARCÍA, Juan (1991). *La intendencia de Venezuela: Don Esteban Fernández de León, intendente de Caracas, 1791-1801.* Murcia, Universidad de Murcia.

BRERETON, Bridget (1981). *A History of Modern Trinidad (1783-1962)*. Kingston (Jamaica), Heinemann.

BRILL, Mark (2011). *Music of Latin America and the Caribbean.* Boston, Prentice Hall.

BROEK, Aart (2011). "Alisios salitrosos: ideología y escritura en papiamento desde la Emancipación en los años 1860 (Aruba, Bonaire y Curazao)", *Cuadernos de Literatura*, 30, pp. 59-86.

CARROLL, Kevin S. (2016). *Language Policies in Puerto Rican Higher Education: Conflicting Assumptions of Bilingualism. Current Issues in Language Planning*. Doctoral thesis. University of Arizona. DOI: 10.1080/14664208.2016.1201186

FELICE CARDOT, Carlos (1973). *Curazao hispánico (Antagonismo flamenco-español)*. Caracas, Biblioteca de la Academia Nacional de Historia.

FERNÁNDEZ VÍTORES, David (2017). *El español: una lengua viva.* 2017 Report. Madrid, Instituto Cervantes.

FERROL, Orlando (1982). *La cuestión del origen y de la formación del papiamento*. The Hague: Smits Drukkers-Uitgevers BV.

HOLM, John (2000). *An Introduction to Pidgins and Creoles.* Cambridge: Cambridge University Press.

GARCÍA MORALES, Guillermo (2013). "La expansión del español en Trinidad y Tobago", *Actas del XLVII Congreso de la Asociación Europea de Profesores de Español*. Madrid, AEPE, pp. 141-151.

GRANDA, Elsa (2009). "El español, un fósil de 500 años en Trinidad y Tobago", *El País,* 18 February 2009.

MOODIE-KUBLALSINGH, Sylvia (1994). *The Cocoa Panyols of Trinidad: An Oral Record.* London: British Academic Press.

MORALES PADRÓN, Francisco (2011). *Trinidad española.* Madrid, MAEC/AECID.

REIS, Michelle (2007). "*Vision 2020*: The Role of Migration in Trinidad and Tobago's Plan for Overall Development". St. Augustine. The University of the West Indies. Available at: http://sta.uwi.edu/conferences/salises/documents/Reis%20%20M.pdf (last access: 6 March 2018).

SEVILLA SOLER, María Rosario (1988). *Inmigración y cambio socieconómico en Trinidad, 1783-1797.* Sevilla, Escuela de Estudios Hispanoamericanos-Consejo Superior de Investigaciones Científicas.

SILVA FERNÁNDEZ, Jesús (2006). "El Caribe anglófono: ¿bilingüismo en una generación?", in *Enciclopedia del español en el mundo. Anuario del Instituto Cervantes 2006-2007*. Madrid, Instituto Cervantes-Círculo de Lectores-Plaza & Janés. Available at: https://cvc.cervantes.es/lengua/anuario/anuario_06-07/pdf/paises_44.pdf

WOOD, Richard (1974). "The Hispanization of a Creole Language: Papiamentu", *Hispania,* vol. 55, n.º 4, pp. 857-64.

Spanish in the Philippines

María Dolores ELIZALDE
IH-CSIC

Relations between countries with past colonial ties are generally somewhat strained—unless they have formed some kind of agreed and voluntarily shared political structure, such as the British Commonwealth. However, the maintenance, or the recovery, of a special relationship between territories that were once linked by colonialism is commonly seen. Such a relationship may be perceptible in political, strategic, technical, or academic collaborations, as well as in certain cultural affinities, customs, and ways of life. Above all, it is evident in the use of a shared language, which for some is their mother tongue, and for others a second language, a factor directly derived from the colonial relationship, and which frequently becomes a source of particular wealth. Such was the case with French in Vietnam, with English in India and in certain parts of South-East Asia, and with Spanish in the republics of Hispano-America. In the case of Spain and the Philippines, unfortunately, the situation is different, because in that Eastern archipelago Spanish did not become the majority language, despite Spain exercising its sovereignty over the islands for more than 300 years. Nevertheless, a new interest can be seen there today in the Spanish language, due to its growing importance worldwide, to the opportunities offered to those who know the language, and to a clear aspiration on the part of both countries to forge closer relations.[91]

1. Spanish settlements in the Philippines and colonial and language policy

The Spanish reached the Philippines in 1521, when Fernando de Magallanes, on his round-the-world voyage—subsequently completed by Juan Sebastián Elcano—reached Cebu Island and took possession of the archipelago in the name of Charles I of Spain, the ruling monarch at that time. On their journey, they sought a route that would allow them access to the Spice Islands and the Asian continent on an alternative course to that granted to the Portuguese in the agreements that regulated the overseas expansion of the two kingdoms—the Treaty of Tordesillas of 1494, complemented years later by the Treaty of Zaragoza of 1529. On reaching the Philippines, the Spanish believed they had at last found the foothold for Asian expansion they had been seeking. Therefore, in the following years, they sent out several exploratory expeditions, to appraise the islands' riches, the possibilities of settling on them, and the maritime routes that would facilitate communication between the Spanish vice-royalties in America, the Pacific Islands and the coasts of Asia.

These efforts culminated in 1565 with the expedition headed by Miguel López de Legazpi, who had the dual objective of settling in the Philippines and of discovering a

[91] This work was carried out as part of the research project "*La modernización de Filipinas, 1868-1898*" (HAR2015-66511-P), financed by the National Research Plan (Spain) and with European Regional Development Funds. It also forms part of the joint project carried out by the Unidad Asociada CSIC-UPF "*Estudios sobre Asia y el Pacífico*".

transpacific return route. This latter task was successfully achieved by the Augustinian Fray Andrés de Urdaneta, who found a route back to the Americas across the Pacific following the Kuroshio Current, which connects Japanese waters to the Californian coast, at a latitude of 42° N. For their part, Legazpi and his troops engaged in battle to settle first on Cebu and later on Panay, before reaching Manila in 1571, where they finally found the conditions and resources necessary to build a stable settlement on the islands.

Thus began a process of colonisation that would last for 333 years, from 1565 to 1898, when Spain was forced to renounce its sovereignty over the islands during the war with the United States, which used its military might to take control of Cuba, Puerto Rico, the Philippines, and the island of Guam in Micronesia, establishing a new colonial administration under US auspices in those former Spanish territories.

When the Spanish reached the Philippines in the 16th century, they made the decision to respect the indigenous languages—following the instructions of the metropolitan authorities and of the religious orders, whose memories of living in the Americas were still fresh in their minds—while colonising the islands and evangelising the population, as a way of forging closer ties with the native population and to avoid alienating them. There was no specific legislation regulating this matter in the Philippines; rather, the Spanish applied the general legislation defined for "the Indies" (as they then called the Americas), adapting it to the local area. The Crown initially indicated the need to introduce Spanish, albeit insisting that force should not be used to impose the use of the language, but at the same time supported the Church's policy of evangelising in the native languages, and respected that the authorities sent to the archipelago would act as they considered most appropriate for that particular territory.[92]

This enabled the islands' indigenous languages to endure, and to become contact languages, a position that was reinforced when the missionaries decided to learn and evangelise in the vernacular languages, translating religious teachings and writing catechisms in the different dialects. Such efforts were significant in terms of preserving and recording the grammar of the different Filipino languages.[93]

Consequently, in the early centuries of Spanish colonisation, beyond Manila and its surrounding areas, the Philippine population living in the rest of the archipelago had little occasion to speak Spanish, given that very few Spaniards lived outside the Intramuros neighbourhood or its outskirts, the missionaries spoke indigenous languages, local dialects were used at schools, and there were always intermediaries to assist with

[92] In this regard, see the work of Joaquín Sueiro Justel, "*La política lingüística española en Filipinas: la polémica de la expansión del castellano*", in *Historia cultural de la lengua española en Filipinas: ayer y hoy* ed. Isaac Donoso Jiménez, Madrid, Editorial Verbum, 2012, pp. 235-252.

[93] Antonio Quilis, "*El legado del español: apuntes sobre la historia y el estado actual de la lengua española en Filipinas*", in *Las relaciones entre España y Filipinas,* Madrid, ed. María Dolores Elizalde, CSIC, 2003, pp. 301-318. A *Doctrina cristiana* was printed for the first time in Tagalog and Chinese in Manila in 1539. The first book explaining the grammar of the Tagalog language (*"Arte y reglas de la lengua tagala*") was published in Bataan in 1610. Fray Juan de San Pedro spoke two Filipino languages, and Chinese. Gaspar de San Agustín spoke Tagalog and composed verse in a Visayan language. Fray Joseph de Madrid spoke Cebuano, another Visayan language, Tagalog and Chinese. Fray Esteban Ortiz spoke Tagalog and Ilocano. These are just a few examples of the linguistic knowledge of the missionaries in the Philippines.

any dealings with the representatives of the Spanish administration. This partly explains why Spanish failed to become the majority language throughout the islands.[94]

The policy pursued, however, gave rise to a significant problem for the governance of the archipelago. The vast majority of the population did not learn Spanish, and therefore the colonial authorities were forced to make use of interpreters to communicate with the islands' inhabitants. This situation meant that intermediaries played a prominent role in communicating with and controlling the native inhabitants. The missionaries who lived in the indigenous villages, and who had learned the local languages, thus became essential to the colonisation process and were figures of authority and representatives of the colonial regime.

Consequently, two centuries after the beginnings of colonisation, as Habsburg rule was coming to an end, Spanish was barely spoken on the islands, except by the colonial and Creole populations and a handful of local elites.[95]

2. The requirement to use Spanish

The new Bourbon dynasty, which succeeded the Habsburg dynasty in 1700, promoted a far-reaching reformist policy during the Enlightenment, issuing more centralist and interventionist guidelines. Based on these premises, the dynasty issued new instructions insisting on the compulsory learning of Spanish, especially as of the reign of Charles III of Spain.[96]

From the middle of the 18th century, and even more intensely in the 19th century, the successive Spanish governments in the Philippines were aware of the need to seize the reins of power, and reassumed a sizeable number of functions that had previously been delegated. This called for the elimination of intermediaries on political and economic issues, and direct communication with the local inhabitants. Therefore, it was decided that Spanish should become a mandatory school subject, and that mastery and use of the Spanish language be established as a prerequisite for those seeking to hold public office.

Many decrees were approved regarding the teaching of Spanish and the necessary requirements for holding public positions and performing official duties. There are multiple examples of this trend, which can be summarised in a single phrase: From that moment on, it was crucial to extend the learning and use of Spanish in the Philippines. Consequently, in 1767 and 1770, Charles III approved a number of Royal Decrees aimed at imposing the use of the Spanish language. In 1771 and 1772, the then governor of the Philippines, Simón de Anda y Salazar, issued two orders stipulating that those who wished to hold provincial and municipal positions had to know Spanish, and reminding the missionaries of the obligation to teach exclusively in Spanish. The missionaries wrote to the monarch requesting flexibility in the application of these orders, but on this occasion Charles III insisted on the need to extend the Spanish language in order to reinforce the hispanization of the islands, which only a few years

---

[94] Sueiro, "*La política lingüística española en Filipinas*", p.246. Antonio Quilis, "*La lengua española en Filipinas y Guinea Ecuatorial*", in *La lengua española hoy* eds. Manuel Seco and Gregorio Salvador, Madrid, Fundación Juan March, 1995, pp. 105-116.

[95] Santiago Muñoz Machado, *Hablamos la misma lengua. Historia política del español en América desde la Conquista a las Independencias,* Madrid, Ed. Crítica, 2017.

[96] *Idem.*

earlier had been threatened by a British invasion. The King thereby affirmed the demand for education to be in Spanish, and for public officials to speak Spanish. However, knowing the islands and the variety of dialects spoken on them, he accepted that, when electing *gobernadorcillos,* while preference would be given to those who had mastered the official language of the administration, this would not be considered a prerequisite, given that in many cases such a demand could not be met.[97]

Since then, the advisability of ensuring that Spanish was spoken in all parts of the archipelago was insisted upon repeatedly, with a view to achieving greater control over the population and a better assimilation of its Spanish inhabitants. In this regard, the Royal Order of 20 December 1863, which established a plan for primary education in the Philippines, was particularly significant. This Royal Order provided for schools to be founded in all the towns and villages of the Philippines, and for all children between the ages of 7 and 12 to be sent to school. In addition, it underlined the requirement that classes be taught in Spanish. The Royal Order also promoted a more professionalised public education system, with classes taught by lay teachers who could receive training at the teacher training college (*Escuela Normal*) founded in 1865.[98] The underlying purpose of these measures was to make Spanish the language of social communication among future generations of Filipinos, with a clear political intent of promoting the hispanization of the population, increasing their acceptance of the colonial regime, and facilitating direct communication between the colonial authorities and the islands' inhabitants. All of this challenged the traditional predominance of the religious orders in education, as well as their role as intermediaries between the colonial administration and the local population, therefore provoking a strong resistance among the missionaries.[99]

Along these same lines, it was stressed that local authorities had to speak Spanish, with a proliferation of legislation regulating this matter approved in 1867, 1868, 1870, 1873, 1876, 1880, and subsequent years. The reiteration of this provision, always insisting on the same points, shows that, despite government interest, these guidelines were not widely followed, and never resulted in all the *gobernadorcillos* and members of the *principalia* (the heirs of pre-Spanish nobility) mastering Spanish.[100]

Consequently, the use of Spanish became generalised only in Manila and its surrounding areas, and in a few other cities. Spanish was spoken in the spheres of administration and justice, in official proceedings, at schools and universities, in trade and in business, in church and at public ceremonies, and at times it even served as a contact language between different language groups. However, in their daily lives, the people of the Philippines continued to use their many native languages.[101]

---

[97] Sueiro, "La política lingüística española en Filipinas", pp. 247-248. John L. Phelan, *The Hispanization of the Philippines. Spanish Aims and Filipino Responses, 1565-1700,* Madison, University of Wisconsin Press, 1959.

[98] Carlos Isabel, "*El Plan de Instrucción Primaria para Filipinas de 1863 y sus orígenes en la legislación educativa española*", *Revista Filipina,* 2, 2014, pp. 25-36.

[99] María Dolores Elizalde and Xavier Huetz de Lemps, "*Un singular modelo colonizador: el papel de las órdenes religiosas en la administración española de Filipinas*", *Illes i Imperis,* 17, 2015, pp. 185-220. María Dolores Elizalde and Xavier Huetz de Lemps, "*Poder, religión y control en Filipinas: colaboración y conflicto entre el Estado y las órdenes religiosas, 1868-1898*", *Ayer* (*Asociación de Historia Contemporánea*), 100, 2015, pp. 151-176.

[100] Carlos Valmaseda, "*Los orígenes españoles de la educación pública primaria en Filipinas*", *Perro Berde. Revista Cultural Hispano-Filipina,* 3, 2014, pp. 89-92.

[101] Jaime Otero indicated that in 1870, when the population was no greater than 4.5 million, Spanish speakers represented 3% of the total population and it is estimated that 60% of Filipinos during that era used Spanish as a second language. "*La lengua española en la región de Asia-Pacífico*", Francisco

Despite this, if history had followed a different course and a US intervention had not occurred, the aforementioned situation would not have prevented Spanish from becoming a language of intermediation in the national construction process of a multilingual territory. As Antonio Quilis observed, in 1898, that is to say, at the time of independence, 757,463 Filipinos spoke Spanish, which would be more than 7,000 times the number of Spanish speakers in, for example, Paraguay, at the time of its own independence.[102] And yet, in Paraguay, as in the other republics of Hispano-America, it was decided to make Spanish the national language on considering it to be a point of contact between the different languages spoken in the territories that had become new independent nations.

In fact, Spanish also played a key role in the 1896 revolution, whose goal was independence, and in the initial stages of the Philippine Republic declared in 1898. In the last few decades of the 19th century in the Philippines, a significant group of educated people—including both indigenous Filipinos and *mestizos* (people of mixed Spanish and indigenous Filipino heritage) had been formed. The members of this elite had studied at the archipelago's Spanish schools and universities, and many had completed their education at universities in Spain or in other countries.[103] They spoke Spanish, in addition to their respective mother tongues, were aware of the political, social, and economic transformations taking place beyond the Philippines, and began to dream of a different future for their own country. They were essential in creating a national Philippine consciousness and in forging an identity shared by all Filipinos.[104]

Many members of this educational elite took part in the revolution, led by Andrés Bonifacio and Emilio Aguinaldo, which broke out on the islands in 1896 against the colonial regime. The rebellion was quashed by the Spanish forces. However, months later, after the war between Spain and the United States spread to the Philippines following a US naval attack, the Filipinos took advantage of the hostilities to pursue their own war for national independence. On 12 June 1898, the Republic of the Philippines was proclaimed and an assembly was formed to perform the task of drafting the Malolos Constitution, approved in 1899. This assembly comprised the leaders and ideologues of the revolution as well as numerous Filipino intellectuals. The Constitution, the new national anthem, and many of the documents were written in Spanish. Additionally, many of the speeches given to mark the occasion were in Spanish, in alternation with Tagalog.[105] Moreover, Article 93 of the Malolos Constitution provided that the use of languages spoken in the Philippines would be

---

Moreno Fernández and Jaime Otero Roth, *Atlas de la lengua española en el mundo,* Barcelona, Ariel, 2007, p. 70.

[102] Observation of Jorge Urrutia at the 3rd Spanish Philippines Forum, Madrid, 4-5 December 2007. Quoted by Andrea Gallo, "*El sino actual de la literatura filipina en español*", ed. Isaac Donoso Jiménez, *Historia cultural de la lengua española en Filipinas: ayer y hoy,* Madrid, Ed. Verbum, 2012, pp. 529-549, quote on p. 530.

[103] José Rizal, Pardo de Tavera, Marcelo H. del Pilar, Graciano López Jaena, Isabelo de los Reyes, Pedro Alejandro Paterno, Mariano Ponce, Felipe Calderón... Resil Mojares, *Brains of the Nation,* Quezon City, Ateneo de Manila University Press, 2006. Megan Thomas, *Orientalists, Propagandists, and Ilustrados. Filipino Scholarship and the End of Spanish Colonialism*, Minneapolis, University of Minnesota Press, 2012.

[104] John N. Schumacher, *The Propaganda Movement: 1880-1895; The Creators of a Filipino Consciousness, the Makers of the Revolution*, Quezon City, Ateneo de Manila University Press, 1997.

[105] *Constitución de la República Filipina: enacted by the National Assembly of Malolos at the formal sitting of 21 January 1899,* Madrid, 1899.Teodoro Agoncillo, *Malolos: The Crisis of the Republic*, Quezon City, University of the Philippines Press, 1960.

optional, but that, in the meantime, the Spanish language could be used for acts of public authority and in the courts.[106]

This indicates that Spanish could have played an important role in a future independent Filipino nation. However, the US intervention and the implementation of a new colonial administration, succeeding the Spanish administration, meant that the process which had occurred in other Hispano-American republics formerly under Spanish rule—which had, on gaining independence, chosen Spanish as their official language, thus making it another feature of nationalisation—was not repeated in the Philippines.

3. Spanish after colonial rule: The language of the past

The imposition of a new colonial administration by the United States in 1898 almost completely eradicated the use of Spanish in everyday life in the Philippines. Emphasis was now placed on the compulsory learning of English, which soon began to be widespread in all spheres, with Spanish disparaged as the language of the former colonisers.

The 1903 census carried out by the US Administration identified fewer than 800,000 Spanish speakers among a population of 7.5 million inhabitants. Fifteen years later, in 1918, the number of Filipinos who spoke English was 896,258, while the number of Filipinos who spoke Spanish was 757,463. To these figures should be added the approximately 1 million people who spoke Chavacano, and who could also be included as Spanish speakers. From that time on, the use of English among Filipinos escalated, while the use of Spanish increasingly declined, despite its remaining a co-official language until the Constitution of 1987.[107]

Albeit as a minority language, Spanish continued to be used by some families of Spanish origin, in certain areas of the administration, in the justice system, in Parliament, and in numerous official documents. The Dominican-governed University of Santo Tomás, the Jesuit-run Municipal Athenaeum of Manila, and the other educational institutions under the aegis of religious orders continued teaching in Spanish until English was established in the 1920s as the compulsory teaching language in all schools. By government edict, the instruction given at the National University of the Philippines, founded in 1925, was also in English.

Some Filipino intellectuals undertook, at that time, a battle to uphold Spanish in the face of the rise of English, asserting its status as an essential aspect of Filipino culture and identity.

Fernando María Guerrero (1873-1929), a Filipino lawyer, politician and teacher who would go on to become a member of the Manila City Council, secretary of the Senate and secretary of the Commission for Philippine Independence, asserted the value of the language against US dictates:

---

[106] *Constitución de la República Filipina*, article 93, p. 36.

[107] Antonio Quilis, "*El legado del español: apuntes sobre la historia y el estado actual de la lengua española en Filipinas"*, ed. María Dolores Elizalde, *Las relaciones entre España y Filipinas,* Madrid, CSIC, 2003, pp. 301-318. Figures included on page 310.

Oh noble Hispania...
a cuya lumbre montando,
clavileños de ilusión,
mi raza adoró la gloria
del bello idioma español,
que parlan aún los Quijotes
de esta malaya región,
donde quieren nuevos Sanchos
que parlemos en sajón.

[O, Noble Hispania!...
By whose embers, astride
Imaginary Clavileños the Swift,
My people adored the splendour
Of the superb Spanish language
That Quixotes of today still speak
In this Malay region
Where new Sanchos require of us
That we speak in Saxon.][108]

For his part, Claro M. Recto (1890-1960), a Filipino jurist, politician and writer, who also served as a senator and member of the Supreme Court, in a speech he intended to deliver to the Royal Spanish Academy, before being prevented from doing so by suffering a heart attack in Rome, made a heated defence of the importance of the Spanish language for Filipinos:

> It is most assuredly not for sentimental reasons, nor out of deference for the great Spanish nation that gave half the world its religion, its language and its culture, that we profess devotion to this language and stand firm in our determination to preserve and to propagate it, but due to national egoism and patriotic imperatives, because Spanish already belongs to us, is the blood of our blood, and flesh of our flesh, because our historical martyrs, heroes and statesmen loved it as such, and without it the inventory of our cultural heritage will be curtailed; because while it is true that the Revolution and the Malolos Republic and the present Republic were built by the people, it is also true that those who instructed and guided were intellectuals who used Spanish to write their books, their speeches, their pamphlets and their essays, to carry out their work of doctrine and propaganda; because it would be tragic were the day to arrive that in order to read Rizal, del Pilar, Mabini, Adriático, Palma, Arellano and Osmeña, we Filipinos had to resort to reading second-rate translations; in short, because Spanish is a motherland tradition that has roots not only in our history but also deep in our souls.[109]

Carlos P. Rómulo (1899-1985), a Pulitzer Prize-winning journalist and writer, who was also a diplomat and politician, serving as an ambassador and as Minister of Foreign Affairs of the Philippines, and as President of the United Nations General Assembly, in 1949, protested against this situation, denouncing:

> [...] our determination to erase the luminous imprint that Spanish has left on the pages of our history. Why ? Has Spanish not contributed to the wealth of our own linguistic culture? Speak

[108] Poem «A Hispania», by Fernando M. Guerrero. Quoted by Manuel García Castellón, "Lengua y letras hispánicas en Filipinas", p. 164.

[109] Claro M. Recto, Speech "*Por los Fueros de una Herencia*". Included in "*La cruzada por el español en Filipinas*", in *The Complete Works of Claro M. Recto* eds. Isgani R. Medina and Myrna S. Feliciano, Manila, Claro M. Recto Memorial Foundation, 1990, vol. 9, pp. 725-726. Quoted by Isaac Donoso in "*Sociolingüística histórica del español en Filipinas*", in *Historia cultural de la lengua española en Filipinas: ayer y hoy,* ed. Isaac Donoso Jiménez, Madrid, Ed. Verbum, 2012, pp. 325-383, quote on p. 337.

tagalog, speak Cebuano or Ilokano, and tell me if you can complete your thoughts without the help of Spanish.[110]

In this environment, Spanish-speaking intellectuals maintained their interest in and commitment to the Spanish language. There was even a golden age of Hispano-Filipino literature, with authors such as Fernando María Guerrero (1873-1929), Jesús Balmori (1887-1948), Isidro Marfori (1890-1949), Antonio M. Abad (1894-1970), Cecilio Apóstol (1877-1934), Manuel Bernabé (1890-1960), Guillermo Gómez Windham (1874-1957), and Adelina Gurrea (1896-1971) all writing in Spanish.[111]

Following on from dynamics that emerged during the Spanish era,[112] there was a great deal of Spanish-language journalism in cities such as Manila, Iloilo, Cebu and Zamboanga, with periodicals such as *El Renacimiento, El Maestro, Semana, Nueva Era* and *Nuevo Horizonte.*[113] In 1909, almost 200 newspapers were published in the archipelago, half of which were in Spanish. The other half alternated Spanish with English or with vernacular languages. However, as the culture of the new generations became Americanised, English-language newspapers began to reduce their Spanish-language sections.[114] In this regard, it has even been noted that, in 1902, the circulation of newspapers in Spanish was almost three times that of those published in English; however, by 1946, the year of independence, the ratio was 40 to 1 in favour of English speakers.[115]

To preserve the use of Spanish on the islands, a number of literary prizes for Spanish-language works were created, such as the prestigious Zóbel Prize, created in 1922 by Enrique Zóbel of Ayala and continued until the present day by his descendants, or that awarded by the University of Santo Tomás, or by publications such as *El Renacimiento,* among others.

The Philippine Academy of the Spanish Language was created in 1924, at the behest of Fernando M. Guerrero. Until the 1950s, this institution was engaged in regular activity, sending representatives to the academic meetings held in Spain, Mexico and Argentina. Its headquarters were at the Casino Español de Manila, which functioned as a social club and a place to enjoy shared interests.

There were also other centres that defended the preservation of the Spanish language, such as the Casa de España or the Jardín Epicúreo, "a latter-day Modernist

---

[110] Carlos P. Rómulo, "*Sería una tragedia prescindir del castellano*", in *Discursos de Malolos y Poesías Filipinas en Español,* Manila, Buró de la Imprenta Pública, 1965, p. 60. The extract is quoted by Isaac Donoso in "*Sociolingüística histórica del español en Filipinas*", p. 336.

[111] Andrea Gallo, "*El sino actual de la literatura filipina en Español*", in *Historia cultural de la lengua española en Filipinas: ayer y hoy,* ed. Isaac Donoso Jiménez, Madrid, Ed. Verbum, 2012, pp. 529-549.

[112] Gloria Cano, "*La solidaridad y el periodismo en Filipinas en tiempos de Rizal*", in *Entre España y Filipinas: José Rizal, escritor,* ed. María Dolores Elizalde, Madrid, AECID-BNE, 2011, pp. 171-201. Wenceslao E. Retana, *El periodismo filipino. Noticias para su historia (1811-1894),* Madrid, Imp. de la Viuda de M. Minuesa de los Ríos, 1895.

[113] Isaac Donoso, "*Sociolingüística histórica del español en Filipinas*", p. 339. Manuel García Castellón, "*Lengua y letras hispánicas en Filipinas. Síntesis histórica y elegía*", in *Entre España y Filipinas: José Rizal, escritor,* ed. María Dolores Elizalde, Madrid, AECID-BNE, 2011, pp. 149-170. Beatriz Álvarez-Tardío, «Adelina Gurrea Monasterio», Biblioteca Virtual Miguel de Cervantes, http://www.cervantesvirtual.com/portales/adelina_gurrea_monasterio. Consulted on 9 January 2018.

[114] Manuel García Castellón, "*Lengua y letras hispánicas en Filipinas*", p. 166.

[115] Jaime Otero, "*El español en Asia-Pacífico*", *Anuario CIDOB,* 2006, pp. 413-423.

circle where poets of the stature of Guerrero, Valdés Pica, Hernández Gavira, Balmori and Roces met to organize poetic jousts."[116]

In the 1930s, the US Government offered Filipinos the possibility of an association that would start them on the road to independence. In that process of building a new Filipino nation, the decision was made to make the most widely spoken native language, Tagalog, the official language uniting all Filipinos, finally overcoming the traditional division between the many languages spoken in the archipelago.

The Constitution drafted by the Constitutional Convention of the Philippines was approved in 1935. The Constitution provided for the adoption of a common national language which would be based on one of the existing native languages. It was also stated that English and Spanish would continue to be official languages "until otherwise provided by law". Significantly, once again, much of said convention was written in Spanish.[117]

Despite this, by the end of the 1930s English had replaced Spanish as a social and trade language. The general reduction in the use of Spanish was even more notable after World War II—during which the Philippines was invaded by Japan and over 200,000 people died in the bombing of Intramuros, the main Spanish neighbourhood—and after the Philippines won independence in 1946.

From that time on, only a few families from the most affluent classes continued speaking Spanish at home. Moreover, certain business elites, in particular among families of Spanish origin, who continued to build up companies that had been created under Spanish rule, as well as other parties from the same social circles, continued speaking Spanish—in addition to Tagalog, English and other languages. Spanish thus became the domain of business and educational elites, and of those brought up speaking the language at home, thus making it both a mark of distinction and, as time went by, an increasingly residual factor.

However, during the era of independence it was decided to once again promote education in Spanish at Filipino schools, to prevent the vast majority of the population from losing their command of the language. The decision reflected the aspiration that the younger generations would keep alive the language in which the founders of the Philippine nation had expressed themselves, and in which so many foundational texts and documents had been written. It hardly seemed advantageous for the children and young Filipinos of the future to have to read José Rizal, Apolinario Mabini or Fernando M. Guerrero in translation, and to be unable to read the literature or the historical, legal, economic, and administrative texts upon which their own nation was founded.

Thus, in 1947, the Sotto Act recognised Spanish as an optional subject in Philippine schools. In 1952, the Magalona Act declared the study of Spanish in schools and universities during two consecutive academic years to be compulsory. And in 1957, the Cuenco Act demanded that certain degrees should include 24 required credit courses in Spanish (this number later reduced to 12). However, these efforts to promote Spanish were unsuccessful. On the one hand, the education provided during that era was inadequate in quality due to the lack of properly trained teachers. Moreover, many of the archipelago's inhabitants did not understand why Spanish should be compulsory and

---

[116] Manuel García Castellón, "*Lengua y letras hispánicas en Filipinas*", p. 164.

[117] Article XIV, sec. 3, *Constitución de Filipinas adoptada por la Convención Constitucional de Filipinas,* Manila, Bureau of Printing, 1935, p. 30. Quoted by Isaac Donoso in "Sociolingüística histórica del español en Filipinas", p. 337.

were resistant to or uninterested in learning it. This fomented a certain amount of resentment against the language of the former colonisers, at the exact moment that the Philippine nationalist movement was gaining traction. This situation lasted until 1973, when Spanish ceased to be a compulsory subject in secondary education. Subsequently, in 1987, it lost its status as an official language and ceased to be compulsory at university level.[118]

At that time, these efforts failed to make Filipinos consider Spanish as a part of their cultural heritage. It was thus relegated to the status of an outdated language—spoken by elites and the haute bourgeoisie, intellectuals and literati, the descendants of Spaniards and mestizos—as opposed to the languages used by the indigenous inhabitants of the archipelago, and in the face of the rise of English.[119]

4. Reasons for the recovery and current promotion of Spanish in the Philippines: The language of the future

The prevailing Philippine Constitution of 1987 determines that Filipino is the national language, English shall be maintained as a co-official language "until otherwise provided by law", and Arabic and Spanish are languages to be promoted "on a voluntary and optional basis".

In the 1990 census, the last in which this figure was included, it was estimated that, out of a total population of 60,559,116 inhabitants, 1,830,000 Filipinos spoke Spanish,[120] even though it was only the mother tongue of 2,657 people.[121]

Today, the Philippines have almost 100 million inhabitants. Only 3% of this population speaks Spanish. The figures on the current number of Spanish speakers vary depending on the experts consulted. They range between one and a half million and a little over 3 million people,[122] in the latter case considering not only those who speak Spanish as a native language, but also those who speak it as a second or third language, or who speak a Creole language, etc. This would include the "group with a native command" of the language, amounting to approximately 439,000 people, in addition to those who speak Chavacano, a Creole language combining Spanish and Portuguese, which even today is spoken by between 600,000 and 1 million people in regions such as Cavite, Zamboanga, Basilan, Cotabate, Davao and TawiTawi.[123]

---

[118] Wystan de la Peña, "*La enseñanza del español en Filipinas. Repitiendo el experimento, recordando las lecciones*", *Perro Berde. Revista Cultural Hispano-Filipina,* 2, 2011, pp. 60-65.

[119] Isaac Donoso, "*Sociolingüística histórica del español en Filipinas*", p. 335.

[120] Antonio Quilis in "El legado del español: apuntes sobre la historia y el estado actual de la lengua española en Filipinas", in *Las relaciones entre España y Filipinas,* ed. María Dolores Elizalde, Madrid, CSIC, 2003, pp. 301-318.

[121] Javier Galván Guijo, "El español en Filipinas", in *Anuario del Instituto Cervantes,* 2006, pp. 163-165.

[122] Rafael Rodríguez-Ponga, "Nuevas perspectivas para la lengua española en Filipinas", *ARI 27/2009,* Real Instituto Elcano, 2009. Jaime Otero, "La lengua española y el sistema lingüístico de Asia-Pacífico", *Documento de Trabajo (DT) 11/2005,* Real Instituto Elcano, 2005. Jaime Otero, "El español en Asia-Pacífico", *Anuario CIDOB,* 2006, pp. 413-423. Francisco Moreno Fernández and Jaime Otero Roth, *Atlas de la lengua española en el mundo,* Barcelona, Ariel-Fundación Telefónica, 2007.

[123] Luis Ayllón, "*El español vuelve a Filipinas*", published on 28 March 2014 in ABC. http://abcblogs.abc.es/luis-ayllon/public/post/el-espanol-vuelve-a-filipinas-16091.asp/. Consulted on 26 December 2017. The figure of 600,000 is provided by Javier Galván Guijo, "*El español en Filipinas*", in *Anuario del Instituto Cervantes,* 2006, pp. 163-165, always much more conservative in his estimates.

Moreover, the linguistic imprint left by the Spanish is very much present. Many Philippine family names are clearly of Spanish origin—the result of a decree issued in 1863 by Governor-General Narciso de Clavería for the purpose of being able to identify each Filipino by a specific name, thus enabling closer monitoring of the population. Thousands of place names deriving from the colonial era have endured and there are numerous towns and cities whose names bear a direct relationship with the Peninsula and with the Hispanic world. There are, furthermore, over 3,000 Spanish words that have entered the native languages, referring above all to everyday objects, in addition to expressions.

Despite this, at an everyday level, Spanish is a residual language. Few families these days speak to their children, or their grandchildren, in Spanish, and the language is essentially spoken among the elderly. In a country with over 120 languages, it is difficult to speak a local language, English, Filipino, and at the same time learn or maintain one's Spanish.

However, an interesting phenomenon is currently occurring that reveals a renewed interest in Spanish as a foreign language. This interest has nothing to do with the historical relationship between Spain and the Philippines, with the colonial ties they have shared, or with previous efforts to promote the teaching of Spanish in the Philippines, but is due to the new opportunities that open up to those who speak the language. Today, Filipinos are once again learning Spanish, this time by choice, motivated by the advantages it can offer for their personal and professional development. The demand for Spanish is due to the development opportunity it represents by helping Filipinos to improve their future possibilities.

Spanish is spoken by approximately 400 million people the world over. It has a significant international dimension as the official language of twenty countries and a language that is spoken in many other areas.[124] It is essential not only because of Spain, but also because of Latin America, as well as its significant expansion in the USA. Speaking Spanish can offer Filipinos easier access to Latin America, a journey in which Spain may become a gateway that facilitates, assists and supports the Philippine expansion in that region. Additionally, in the USA there are almost 40 million Spanish speakers, a figure which, according to US Census Bureau forecasts, could reach 100 million by 2050, making the USA the country with the largest number of Spanish speakers in the world.[125] All this has led to Spanish becoming viewed as a new international language, as a useful instrument offering interesting possibilities for development and work-related advances.

This interest has, firstly, a domestic dimension. In the past decade we have witnessed growing demand on the part of the Philippine labour market for professionals who speak Spanish, as well as a clear rise in Spanish teaching.[126] Spanish opens the islands up to new possibilities of employment in business, academia, tourism, and in the service industries. In certain disciplines such as law, history, library management, documentation and archiving, Spanish continues to be enormously useful to understand documents belonging to the Philippines itself. Furthermore, business process

[124] Jaime Otero, "*El español en Asia-Pacífico*", *Anuario CIDOB,* 2006, pp. 413-423.

[125] Entry written by the advisor to the Department of Education Francisco Javier Menéndez. Quoted by Carlos Juan, "*Viejos vientos, nuevos rumbos: el español en Filipinas*", *Perro Berde. Revista Cultural Hispano-Filipina,* 2, 2011, pp. 56-59.

[126] Isaac Donoso, "*Sociolingüística histórica del español en Filipinas*", p. 344-345. Javier Galván, "El español en Filipinas", *Anuario del Instituto Cervantes,* Madrid, Instituto Cervantes, 2006-2007, pp. 163-165. Dan Munteanu, "*La situación actual del español en Filipinas*", *Lingüística Española Actual,* 2006, 28, pp. 75-80.

outsourcing (BPO), which encompasses international call centre activities, has acquired notable significance in the Philippines. This is a sector that already employs 6 million people, with a turnover of more than 8 billion euros, and is still growing. According to the Philippines Central Bank, in 2010 this sector grew by 21.8% with respect to 2009, making the country one of the main international hubs for such operations. Young Filipinos, who generally speak excellent, accentless English, have shown a renewed interest in learning Spanish, as it is a good tool for finding a better job as a "telephone operator" working with the Spanish-speaking market, as Spanish is the second call-centre language, after English, and those (bilingual) employees who can speak it earn much higher salaries.[127]

Spanish has, secondly, a significant external dimension, given the huge market of Filipinos working abroad. The Philippine Government has for decades actively supported the emigration of workers from the country, promoting their incorporation into the international workforce. The remittances sent by these overseas workers have become an important asset for Philippine GDP and a crucial help for many families. In this context, knowledge of Spanish could become an important element for finding more job opportunities, both in Spain and elsewhere.

Filipinos can, and must, find work in broader, better qualified and better paid professional sectors, but for the time being they are much sought after as crew to work on boats the world over—more than 350,000 people—as hospital nurses—where bilingualism is particularly valued—and as domestic workers who are especially appreciated for their professionalism, adaptability and warmth.

By way of example, in Spain there is a significant community of Filipino workers, comprising 60,000 people. A significant portion of these emigrants are engaged in domestic work, or the care of children or older people, but a growing number of specialised professionals are becoming integrated in the general workforce of our country.

This has led to a rise in demand in the Philippines for Spanish as a foreign language and as a language of culture, as has occurred in other countries in Europe, Asia and the Americas.[128]

An average of 7,000 students study at Instituto Cervantes in the Philippines each year, and enrolments continue to rise. This institution even offers courses aimed at two specific job niches: Spanish for call centres and Spanish for teacher training.

In addition, while Spanish has ceased to be a compulsory subject on Philippine university study programmes, prestigious universities have maintained it as an optional subject, taught at over 30 universities. Some 20,000 Filipino students begin a Spanish course each year, over 12,000 of them at university level.[129] According to data provided by E. T. L. Bautista, an academic at the University of the Philippines (UP), in the first six-month term of the 2004-2005 academic year, Spanish was chosen as a foreign language by 1,126 students; French by 721; German by 346; Italian by 291; Portuguese

[127] María Dolores Elizalde, *La proyección actual de España en Filipinas: imagen y relaciones políticas,* working document, Real Instituto Elcano, October 2014, pp. 1-46.

[128] Jaime Otero, "El español en Asia-Pacífico", *Anuario CIDOB,* 2006, pp. 413-423.

[129] Javier Galván Guijo, "*El español en Filipinas*", in *Anuario del Instituto Cervantes,* 2006, pp. 163-165.

by 112; Latin by 58; and Russian by 46. Were more recent figures available for comparison, the results would unquestionably be even higher for Spanish.[130]

Furthermore, the public professional training body TESDA (Technical Education and Skills Development Authority) has created the National Language Skills Institute (LSI) with courses in Spanish that are directly aimed at helping students find employment.

With the right policies, above all as regards the training of local teachers, the dissemination of Spanish in the Philippines could increase greatly in the coming years.[131]

The government of the Philippines is perfectly aware of this situation, and therefore, in close collaboration with the Spanish government, in 2007 it introduced a new language policy, partly due to the discussions regarding language taking place in the archipelago at that time and partly due to the political commitment of President Gloria Macapagal Arroyo and her administration, which considered that it would be positive for Philippine society to reintroduce the teaching of Spanish in its educational system, an objective supported by the Spanish government. Work was subsequently begun "to reintroduce Spanish into the Philippines", including the adoption of a pilot programme in 2008 to teach Spanish at some secondary schools, and the signing of a preliminary agreement at the Spain-Philippines Forum held on Cebu Island in 2008 and at numerous bilateral meetings between the two countries designed to attain this goal.[132]

This policy was supported by the agreements signed in 2010 and 2012 between Spain and the Philippines to reintroduce Spanish on the islands. By virtue of the collaboration programme between the Ministries of Education of the two countries, Spanish is currently being taught to 8,000 students at 72 secondary schools. It is still a small initiative with a minor impact, especially when bearing in mind that the archipelago has over 100 million inhabitants, but it is a step in the right direction and a starting point for the further efforts required.

In this new scenario, the opportunity should be seized to continue promoting the teaching of Spanish through various channels.

Firstly, it is essential to continue to support the efforts of Instituto Cervantes, a key institution in the Philippines, which does outstanding work in terms of teaching the Spanish language and disseminating Spanish culture in Manila. In this regard, consideration is being given to the possibility of opening smaller centres at different points of the islands, such as Quezon City (one of the largest university areas), Cebu Island, Iloilo, Davao, and Zamboanga. Another option would be to create small Instituto Cervantes centres within the universities themselves, as the Confucius Institute has done in the Philippines, to provide university students with easier and quicker access to learning Spanish. In this case, it would be advisable to establish collaborations with the university's existing Spanish department, in order for the two institutions to mutually reinforce each other's efforts. In all such initiatives, emphasis must be placed on ensuring the quality of the language teaching, as well as on having a sufficient pool of well-trained and motivated teachers.

---

[130] Jaime Otero, "*El español en Asia-Pacífico*".

[131] Javier Galván Guijo, "*El español en Filipinas*".

[132] Isaac Donoso, "*El español y la política lingüística en Filipinas*", Isaac Donoso Jiménez (ed.), *Historia cultural de la lengua española en Filipinas: ayer y hoy,* Madrid, Ed. Verbum, 2012, pp. 429-447.

In addition, it is necessary to continue encouraging the teaching of Spanish within the Philippine public system, as not everyone can enrol at Instituto Cervantes. AECID could contribute by providing more language trainers and undertaking or participating in more development projects focused on education. The Ministry of Culture could strengthen its cultural cooperation programme, increasing the Spanish departments at schools and promoting the creation of new Spanish language and culture classes and agreements with schools.

Another option that has been studied is that of creating an Official Spanish School in Manila, similar to the prestigious schools of this nature founded by the British, French, and Germans.

It is also advisable for Spanish teaching to be linked as closely as possible to relations with Spain, facilitating travel to the country and offering scholarships at Spanish institutions to Filipino students, so that they can practice the language and learn about our society and our culture.

In this regard, the increase in academic relations between the two countries could contribute to the dissemination of Spanish. In this same vein, exchanges between students and professionals should be encouraged by creating more internships and scholarships enabling Filipinos to study or train in Spain and vice versa, and giving greater publicity to existing programmes. Bear in mind that 530,000 students graduate from Philippine universities every year. The time spent in another country not only provides specific knowledge, but is fundamental to learning about other cultures, broadening the mind, strengthening relationships, creating permanent ties, and promoting future collaborations.

It would also be advisable to support Spain's presence at the *European Higher Education Fairs,* at some of which there has been minimal participation by Spanish institutions, compared with the overwhelming attendance of British, French, and German universities.

Efforts should be made to promote the creation of joint post-graduate courses at Philippine and Spanish universities, and to resolve the problem concerning the interchangeability and recognition of qualifications for access to higher education in Spain.

The efforts undertaken to promote collaboration between Spain and the Philippines are beginning to bear fruit in the form of joint research projects with national or international financing. Additionally, we are seeing an increase in meetings between Spanish and Filipino academics and in the publication of works publicising the collaborations established and the results obtained—a professional channel that will also help to promote the knowledge and use of Spanish in the Philippines, opening up new opportunities for the future.

Spanish in the Philippines: A state language

Carlos MADRID ÁLVAREZ-PIÑER
Instituto Cervantes in Manila

"In the Philippines, the Castilian language is an aspect of continuity," said the Filipino intellectual Teodoro M. Kálaw in 1931.[133] With this statement as our starting point, we can reflect on how Spanish made an important contribution to the structure and development of the Philippines as a State, and we can consider why the Filipino Spanish language persists, the shape it has taken, and, above all, how the Spanish language can play a role in the country's future.

When, during the drafting of a new constitution, the Philippines' Constitutional Commission voted against including Spanish among the national languages of the country in 1986, it did so, as we will see, after a debate on the historical importance of the Spanish language in the Philippines. This decision marked yet another step in the slow retreat of Spanish, compounded in the same year by the removal of the language as a compulsory subject in university education. More than 20 years would pass before, in 2007, a new horizon was opened as regards the teaching of Spanish in public institutions.

It is important to note than in Spain the perception of the prevalence of the Spanish language in the Philippines is somewhat distorted, resulting in the impression that there was a loss, when the reality was always a smaller presence in quantitative terms, but one that remains qualitatively significant; it was in this context that the Philippines was first defined as a State.[134]

During Spain's long presence in the archipelago, from 1565 to 1898, language policy was disjointed and inconsistent. The very nature of the initial colonization, focused on the religious conversion and taxation of the inhabitants, favoured and necessitated a policy of linguistic adaptation, of translation, and of comprehension of local languages. This not only gave rise to a body of works on indigenous grammar and vocabulary of extraordinary ethnological value, it also established a dynamic for cultural interaction that would serve as the foundation on which future generations would build their national identity—appropriating elements of the dominant culture, to a greater or lesser degree.

A Letters Patent issued by Philip IV of Spain on 2 March 1634 urged the ecclesiastical authorities in the Philippines to promote the teaching of Castilian Spanish to the Christianized indigenous population. King Charles II of Spain, on 20 March 1686, decreed that "the Indians shall know the Castilian language", in order to facilitate their complaints to the Crown without a need for "interpreters, who can change the translation". Almost a century later, during the reign of Charles III, a policy of

[133] Teodoro M. Kaláw, "Discurso de don Teodoro Kálaw" [Treatise by Mr. Teodoro Kálaw], in *Voz Española,* 25 July 1931, p. 64.
[134] Javier Galván, "El español en Filipinas" [Spanish in the Philippines], in *Anuario del Instituto Cervantes 2006-2007,* Madrid, Instituto Cervantes, 2006, pp. 163-165.

eradication took shape, among other documents in the Royal Letters Patent of 16 April 1770, which decreed that the different languages should be eliminated so that "only Castilian Spanish is spoken".[135] It is fair to say that this was a wide-reaching governmental decree, which also provided for the establishment of schools in each population centre. These efforts to spread Castilian Spanish and eradicate local languages were sporadic, rather than forming a specific systematic policy of elimination. Numerous decrees required that Spanish be taught, but they were not fulfilled.[136]

Over the following two centuries of Spain's presence, the slow advance of the colonizing State and its governance structure (Royal Household, Roman Catholic Church, schools) made the expansion of Castilian Spanish a sensitive issue. The colonizers implemented measures that were active in varying degrees, and the colonized people reacted in favour or against them. In the 19th century, following the liberalization of the Filipino economy—which, among other phenomena, set the stage for development of a local bourgeoisie—some of the grievances of the indigenous and mestizo middle classes, including the Filipino intellectual José Rizal, were focused on protesting against Spanish not being taught.[137] Although compulsory teaching of Spanish was provided for in the "Royal Decree establishing a plan for primary education in the Philippines", of December 1863, on the recommendation of the Minister for Overseas Territories, José de la Concha,[138] to a large extent, in practice, Filipinos were not taught Spanish because of its fragile implementation in the country at the time of its independence. This was only offset by the need to have a shared language for communication between the different islands in the archipelago; in this regard, Spanish was the only *lingua franca*.

Spanish vs Tagalog: Two competing languages

Beginning in the late 19th century, the Philippines' multi-ethnic society—led by the Tagalog bourgeoisie from the provinces of Luzon that lie closest to Manila— aspired to build an independent state, after efforts to recover political representation in the metropolis failed.[139] Their aspiration of attaining governance structures and a separation of powers was descended from the Western world, but was forged by creating a national identity that aimed to unite the country's indigenous peoples: the Tagalogs, the Visayans and the archipelago's other ethnic groups, which were historically removed from the general decision-making process during the centuries that the colony lasted.

The very aspiration of having a representative State, a State that guaranteed individual freedoms in a constitution, was a direct and unmistakeable inheritance from

[135] The Letters Patent, which applied to the Philippines, resulted, in the Americas, in the Revolt of the Comuneros in what is now Colombia. María Margarita Róspide has written about this application in "La enseñanza del castellano en los reinos de Indias a través de la legislación real" [Teaching of Castilian Spanish in the Kingdoms of the Indies through Royal Legislation], in *Investigaciones y Ensayos*, 34, Buenos Aires, National Academy of History of the Republic of Argentina, 1987, pp. 445-490.

[136] Royal Decrees of 1772, 1774, 1776 and 1792. Cited in Nicanor G. Tiongson, *Women of Malolos,* Ateneo de Manila University Press, 2004, pp. 150-153.

[137] The article "Algo es algo" [Something is better than nothing] in the periodical *La Solidaridad,* published on 15 April 1891 (Madrid, año III, n.º 53, p. 158), covers the details of this matter superficially. It was signed "Naning", a pseudonym of the Filipino physician Mariano Ponce.

[138] Carlos Valmaseda, "The Spanish origins of state primary education in the Philippines", in *Perro Berde. Revista Cultural Hispano-Filipina, 3 (2014), pp. 89-92.* Tiongson, op. cit., p. 153.

[139] María Dolores Elizalde, "Filipinas en las Cortes de Cádiz" [The Philippines in the Cortes of Cadiz], in *Historia y Política,* 30 (2013), pp. 177-203.

the calls for political liberalism in the metropolis. It was a nationalist aspiration with broad public support, and a movement that was unprecedented in the traditional indigenous societies of the Philippine archipelago and in Southeast Asia, where power, knowledge, and collective decisions were distributed in very different and miscellaneous ways, with almost no centralized, organized education system.[140]

The political vocabulary of the Filipino independence movement, its constitutionalist nature, and its articulation of political aspirations all naturally arose from Spanish constitutionalist liberalism. The Philippines' Malolos Constitution of 1899, which was the first republican constitution in Asia, duplicated the list of civil and political rights from the Spanish Constitution of 1869. Almost all of the articles of the failed 1896 constitutional text of Biak-na-Bato reproduced the wording of the Cuban Constitution of Jimaguayú, reflecting the extensive political ties between Cuba and the Philippines.[141]

At the same time, in opposition to the Spanish identity that projected legal and moral superiority from a position of colonial power, Asian indigenous identity—above all Tagalog—was being advocated through a variety of initiatives, such as the early spelling changes for Castilian Spanish words (*Komandante, Kapitan*), seemingly reflecting an appropriation and modification of the formal and linguistic aspects of the categories of European liberalism and its power structures, to emphasize self-identity and thus rationalize a narrative that in practice reconciled two supposedly conflicting extremes: Filipino indigenous identity, and the validity of the Spanish governance structures and many of the Spanish legal codes. The indebtedness to the Spanish legacy was always acknowledged, but the desire to shape a self-identity had a limiting effect. The delegates at the Malolos Congress, who were drafting the Philippines' Constitution, rejected the draft submitted by Pedro Paterno because it was too similar to the Spanish Constitution of 1869.[142]

The need to make use of the tools inherited from the Spanish—the language being one of the most important legacies—was complemented by adopting Spanish cultural or political elements for the new government. The Filipino composer Julián Felipe, who produced the music for the Philippines' national anthem in 1869, borrowed the first few bars from Spain's national anthem, the *Marcha Real.*[143] Although the anthem was initially without lyrics, a poem by José Palma entitled *Filipinas* was adapted one year later, and translated into English several years after that. Significantly, the lyrics were not translated into Tagalog until the 1940s, in the middle of the period of Japanese occupation.

Early identification with European constitutionalism was logical. But what about language? A detailed reading of laws and political texts (such as speeches,

---

[140] As noted by the Swedish economist Gunnar Myrdal, the Spanish Philippines was the Asian colony that most stood out in terms of educating the population. Gunnar Myrdal, *Asian drama: an inquiry into the poverty of nations,* New York, Pantheon, 1968, vol. 3, p. 1633.

[141] The striking similiarities between the two texts were proven by Jaime C. de Veyra in "The Constitution of Biak-na-Bató", *Journal of the Philippines Historical Society,* vol. I, n.º 1 (July 1941), pp. 3-11. The Constitution of Jimaguayú was of a revolutionary nature, and combined the legislative and executive powers into a single entity called the *Consejo de Gobierno* [Council of Government]. Since September 2015 it has been included in the National Register for the UNESCO Memory of the World Programme.

[142] For example, it is presented thus to pupils of the Philippines' history in: Maria Christine N. Halili, *Philippine History,* Quezon City, Rex Bookstore, 2004, pp. 166-167.

[143] This episode is recalled by the composer in a manuscript entitled *Historia de la Marcha Nacional Filipina* [The History of the Philippines' National March], signed in Cavite in June 1898. Other bars were inspired by *La Marseillaise,* and by the Triumphal March from Verdi's opera *Aida*.

proclamations, and objectives of the nascent Philippine Republic) reveal early use of Tagalog over Spanish as a form of protest. The printed media of the armed organization Katipunan, the ill-fated newspaper *Kalayaan*, was written entirely in Tagalog, as was an initial anthem *Marangal na Dalit*, commissioned by the leader of Katipunan, Andrés Bonifacio, although there was soon a Spanish version of the lyrics.[144] The Malolos Constitution was in Spanish, but avoided stipulating an official language. Instead, its Article 93 ambiguously provided freedom in usage of the languages spoken in the Philippines, with no obligation to use any single one. That usage could only be regulated in a law, which would only establish the language to be used in official and judicial functions. Until that law became a reality, in those two areas Castilian Spanish would be used "for the time being".[145]

This level of resistance from Filipino revolutionaries to adopting Castilian Spanish as an official language contrasts with the necessity of its use, especially when revolutionary flyers were printed,[146] or in newspapers such as *República Filipina, La Revolución,* and *La Independencia*—all of which were written in Spanish. Castilian Spanish had been spoken as an expression of a cultivated culture for three centuries, and adopted by large minority of the population, and was also the only *lingua franca* at the time of the revolution. The resistance to adopting Spanish officially should be considered in the context of the problem that the colonial government faced regarding its lack of teaching and it being made compulsory at a late stage. While the Spanish-speaking Filipino nationalists had opposed these decisions and the authority that issued them by political means, the Tagalog-speaking revolutionaries offered their opposition on the battlefield.

Even the Philippine Constitution of 1935, despite being written in Spanish and English, stated in Article XIII, Section 3, that "common national language" would be adopted "based on one of the existing native languages" and that English and Spanish would continue as official languages "until otherwise provided by law". [147]

The gradual identification of Tagalog culture with Filipino culture took the form of a slow process of constructing an identity during the 20th century. [148] Tagalog was selected as the national language on 13 December 1937, in a decree issued by President Manuel Quezon, including the rationale that Tagalog was the language of the revolutionaries, even though Spanish was the most widely spoken language during independence. The Constitution of 1943, under the Japanese government, stated that Tagalog would be developed as a future national language.

The evolution of Spanish in the 20th century

[144] See the article entitled *The National Anthem's predecessor and influences,* on the website of the Philippine Government: http://malacanang.gov.ph/7815-the-national-anthems-predecessor-and-influences/. (Visited 12 January 2018.)

[145] *The Constitution of the Republic of the Philippines: decreed by the National Assembly of Malolos at its solemn session of 21 January 1899,* Article 93, p. 36. Quotation marks are our own.

[146] Such as, for example, "Filipinos", by Felipe G. Calderón, which he included in his work "Mis memorias sobre la Revolución filipina" [My memories of the Philippine Revolution], Manila, Imp. de El Renacimiento, 1907.

[147] Fernando Zapico Teijeiro, "El idioma español en Filipinas" [The Spanish language in the Philippines], in *Filipinas en el siglo XXI,* n.º monográfico del *Boletín Económico de ICE,* 3074 (2016), pp. 63-70 (esp. p. 64, n. 2).

[148] Katrina Ross A. Tan, "Constituting Philippine Filmic and Linguistic Heritage: The Case of Filipino Regional Films", in Hsin-Huang Michael Hsiao, Hui Yew-Foong and Philippe Peycam (eds.), *Citizens, Civil Society and Heritage-making in Asia,* Singapore, ISEAS-Yusof Ishak Institute, 2017, pp. 137-162.

The reality of Spanish in the Philippines is that it was never spoken throughout the archipelago, but will never be lost completely. The colonial policy on Spanish teaching did not achieve its goal for a number of reasons: a lack of resources and opposition from some sectors prevented it from being implemented fully. The failed bid for independence from the United States and the identification of the Spanish language with the dominant economic class are other factors that should be taken into account.[149]

In the mid-1880s, it was calculated that 200,000 Filipinos spoke Spanish, i.e. 3.3% of the 6 million inhabitants of the Philippines recorded in the official census of 1887.[150] With almost the same number of men as women, there were more male Spanish-speakers: approximately 3.3% of men, compared to 2.12% of women.[151] In the last few years of the Spanish period, these figures rose spectacularly to over 10%, although in the 1918 census, Spanish-speakers represented 7.5% of the population, i.e. 757,463 speakers of Spanish out of a population of 10 million. By 1939, this percentage had fallen to 2.6%.[152]

However, in those first few decades of the 20th century, before the Japanese invasion, all of the major Filipino writers, politicians, and orators of the first half of the 20th century, who used Spanish to express themselves, in addition to Tagalog and English, referred to Spanish as a language in decline, on the defensive, which they should be proactive in conserving:

> We are now so few, we cultivators of the Spanish language in this country, that the void left by some must be immediately filled by others […]. We strive in the midst of disheartening official indifference, and without the presence or the applause of the multitude, who in bygone years were welcoming and magnanimous.[153]

> [...] We are so very alone and so few that the advocates and supporters of the sublime Castilian Romance language can almost be counted on one's fingers. Look at the theatres! A show is on in Spanish, and the auditorium is cold.[154]

---

[149] Mauro Fernández, «La enseñanza del español en Filipinas» [Teaching of Spanish in the Philippines], in *Actas del XXXVI Congreso Internacional de la Asociación Europea de Profesores de Español. Extremadura en el Año Europeo de las Lenguas [*Extremadura in the European Year of Languages*],* Cáceres, Centro Virtual Cervantes, 2001, pp. 49-53.

[150] Number of Spanish-speakers cited in Agustín de la Cavada, *Historia geográfica, geológica y estadística de Filipinas* [A Geographical, Geological and Statistical History of the Philippines], Manila, 1876; cited in *Revista de España,* Madrid, año 20, n.º CXVI (May and June 1887), pp. 54-57; number of speakers in the Official Census of 1887, cited in the *Guía Oficial de las Islas Filipinas* [Official Guide to the Philippines]. 1898, p. 203. Similar figures in Ricardo Collantes, "*Presente y futuro de la enseñanza del español en Filipinas*" [The present and future of Spanish teaching in the Philippines], Cuadernos del Centro Cultural, 4 (1977), Manila. A passing reference that the Spanish minister Manuel Becerra made in 1885 to 50,000 Filipino Spanish-speakers, i.e. just 0.8% of the population, may be due to the availability of data only for Luzon. Session of 30 June 1885. *Diario de Sesiones de las Cortes*, n.º. 185, pp. 5600.

[151] Louis Vivien Saint-Martin, *Nueva geografía universal* [New Universal Geography], Barcelona, Montaner y Simón, 1881, vol. II, p. 436.

[152] These figures should be treated with caution, as they did not include those who spoke Spanish as a second language, or speakers of everyday Spanish, or speakers of Chabacano. Including these groups would potentially substantially increase the proportion of Spanish speakers. The references to the 1918 and 1939 censuses are taken from Florentino Rodao, *Franquistas sin Franco* [Francoists without Franco], Granada, Editorial Comares, 2012, p. 285. The total number of speakers is taken from "Population of the Philippines by Censal Year" in ensus of Population and Housing Report, Manila, 1960, p. 1. By the same author, Florentino Rodao, see also "La lengua española en Filipinas durante la primera mitad del siglo XX" [The Spanish Language in the Philippines in the first half of the 20th century], in *Estudios de Asia y África*, vol. XXXI, n.º 1 (1996), pp. 157-175.

[153] Kálaw, op. cit., p. 10.

[154] José Sedano, *Voz Española*, 25 de julio de 1931, p. 10.

> The preservation of the Spanish language alongside English and a native language is no obstacle to the development of a vigorous and distinctive national culture.[155]

In his 1936 report on the Philippines, the Argentine diplomat Ramón Muñiz Lavalle shared the sorrow of Rafael Palma, who at that time was the President of the University of the Philippines: "Our Spanish classes are almost empty. Interest in this language is the frivolous endeavour of a few who want to shine in society."[156] The pessimistic outlook of Muñiz and Palma must be understood in context: Their pessimism may be due to the comments being made in a context of rapid decline, since when the former wrote his report, statistics showed that many key segments of the population could understand and speak Spanish.

However, it was not the language used by the working class outside urban areas, and especially not in the rural areas of the Philippines. Spanish was, alongside English, the language of the professional, university-educated, intellectual, political and commercial class: men like Enrique Laygo, Antonio Abad, or the illustrious Jesús Balmori, who founded the Philippine Academy of the Spanish Language in 1924. The Premio Zobel award, created in 1920 by the entrepreneur and philanthropist Enrique Zóbel de Ayala, has been awarded regularly, but with growing difficulties, most recently in 2001.[157]

This slow but steady decline of Spanish was due to the failure of the various efforts made by the teaching system to preserve the language, since laws were political decisions that contrasted with the lack of teachers, or a methodology to put these policies into practice. Examples of this include the Sotto Act (1949) on the learning of Spanish as an elective in secondary schools;[158] the Magalona Act (1952), which, in addition to preventing university degrees from being offered without including Spanish in the syllabus, also made Spanish a compulsory subject (12 credits over two consecutive years) in all of the country's universities, whether state-run or private;[159] and the Cuenco Act (1957),[160] which was not free from controversy: Proposed by the Cebuan congressman Miguel Cuenco, although it increased the number of compulsory credits of Spanish to 24 for those studying for degrees in Law, Trade, Humanities, Foreign Service, and Pedagogy, it also established a condition that seminal works by the founding fathers of the Republic of the Philippines were to be studied in the original Spanish—specifically, "Memoirs of the Philippine Revolution" by Apolinario Mabini, speeches from the Malolos Congress, and the poems of José Rizal, among other great poets. The use of rote learning, together with the lack of qualified teaching staff, and pupils unwillingness to take on more subjects, resulted in complaints and protests to

---

[155] Rafael Palma, "La mentalidad de la raza como resultado de la fusión de culturas e idiomas" [Race mentality as a result of the blending of cultures and languages], *Voz Española,* 25 July 1931, p. 7. Palma was President of the University of the Philippines (UPI) and of the Philippine Academy of the Spanish Language.

[156] Ramón Muñiz Lavalle, *Filipinas y la Guerra del Pacífico. Reportaje sobre la independencia filipina y el imperialismo asiático de los Estados Unidos* [The Philippines and the Pacific War. A report on Philippine independence and the United States' imperialism in Asia], Madrid, Bolaños y Aguilar, 1936, p. 204.

[157] Lourdes Castrillo Brillantes, "81 Years of Premio Zobel: A Legacy of Philippine Literature in Spanish", Macati, Georgina Padilla y Zóbel-Filipinas Heritage Library, 2006.

[158] Republic of the Philippines (1949) Vicente Sotto Spanish Law. Circular #25, series 1949. Teaching of Spanish in the Secondary Schools.

[159] Zapico, op. cit., pp. 64-65.

[160] Republic Act n.º 1881 (Cuenco Law). Approved 22 June 1957.

have the law struck down.[161] In 1967, giving in to the protesters, the compulsory credits were reduced to 12.

The 1973 Constitution, at the height of the Ferdinand Marcos dictatorship, attempted to spread a shared linguistic identity by ordering the creation of a "Filipino" language, which essentially took Tagalog and added linguistic nods to other Filipino languages. The official status of Spanish was maintained, but reduced to a minimum, while the thousands of historical documents in the National Archives of the Philippines remained untranslated.[162] Nevertheless, the undeniable historical influence of the Spanish language on Filipino identity was acknowledged by maintaining compulsory study of Spanish at university, albeit for a total of a mere 12 credits. Spanish was still the language of jurisprudence, and in the fields of medicine and pharmacology it was given particular importance in universities such as Santo Tomás, but it was displaced as a language to unite the nation around a shared tongue. We therefore consider that Spanish declined in the Philippines because it lost the competition against Tagalog as the official State language, as well as losing the battle against English.

Spanish from 1986 to 2007

The constitutional debate of 1986 is particularly interesting in terms of understanding the status of Spanish in the last decade of the 20th century, as the Constitutional Commission provided the setting of what is, to date, the last official debate on maintaining Spanish as an official language of the Philippines. This is where we find the most testimonies to the unrelenting tug of war between Tagalog and English, as opposed to the need to acknowledge the role of the Spanish language in the State, and efforts to prevent the loss of the Spanish language's official status, as defended by some of the country's great jurists, many of whom received their academic training in Spanish. In the day-to-day of this wide-ranging debate that was shaping the Philippine Constitution of the late 20th century, it can be seen that Spanish had not disappeared from the political arena.

The Commission met from 2 June to 15 October 1986, chaired by the renowned jurist Cecilia Muñoz Palma, with Senator Ambrosio B. Padilla as her deputy; both of them were Spanish speakers, as were many other members of the Commission. The working language of the Commission, which was spoken by all of its members, was English. During the debate on the suitability of maintaining the Spanish language's official status, and on maintaining the teaching of Spanish in the national education system, the commission member Felicitas S. Aquino, a lawyer by training, expressed her vehement opposition, listing grievances against Castilian Spanish. Her arguments proved provocative even for the Deputy Chairman Padilla himself, who requested the floor, and responded to Aquino emphatically, clearly, and in Spanish, as recorded in the minutes of the Constitutional Commission:

> Mr Presiding Officer, I would like to speak in favour and in support of the amendment tabled by Messrs Rodrigo and Ople and in reference to the statements by Mr Tingson, on the writings of our founding fathers, and particularly the immortal novels by our national hero *Noli Me Tángere* and *El Filibusterismo* [The Reign of Greed], and other poetry of great patriotic value, such as *Mi Último Adiós* [My Last Farewell] and *Mi Retiro* [My Retreat].

[161] Erwin Fernández, *The Diplomat-Scholar: A Biography of Leon Ma. Guerrero,* Singapur, ISEAS-Yusof Ishak Institute, 2017, pp. 207-208.

[162] The Constitution did not provide for this, but was amended by Presidential Decree 155, of 15 March 1973.

> I would like to add that the historical legacy from our Mother Spain include our Civil Code and Criminal Code, both of which are based on those of Spain. If our law students are able to read and understand the Spanish language and the writings and commentaries of Spanish authors, such as Manresa as regards the Civil Code and Viada for the Criminal Code, our lawyers working in civil law and criminal law will be better prepared. For this reason, I call on the Commission to support the amendment in favour of the Spanish language. Thank you very much.[163]

The problem with communicating in Spanish is reflected in the evident difficulty in transcribing the speaker's words. One of the members of the Commission (Minda Luz M. Quesada) asked him to repeat his remarks, and Padilla responded by repeating them in Filipino, rather than in English.

During the many debates on other items of business, in addition to occasional references to the colonial past, phrases were sometimes quoted in Spanish: fragments of poetry by Antonio Machado—and his lines "*caminante no hay camino, se hace camino al andar*" [wanderer, there is no path, the path is made by walking], by Commissioner García[164]—and occasionally sayings in Spanish—"*cuentas claras*" [up front], as said by Commissioner Villegas,[165] or "*a grandes males, grandes remedios"* [desperate times call for desperate measures], as said by Commissioner Sarmiento[166]. The Spanish Constitution of 1978 was quoted a number of times as regards the Autonomous Regions of Spain, and the Basque Country was given as an example of the chaos caused by a lack of autonomy.[167] When articles from the most recent Spanish Constitution (specifically Article 143) were cited, this was done in English. [168]

Moving beyond anecdotal examples, the Constitutional Commission of 1986 also formally debated the official status of Spanish. The President of the Confederación Nacional de Profesores de Español, Inc. [The National Federation of Spanish Teachers], Rosario Valdés-Lamug, sent a letter urging the Constitutional Commission to include Spanish as one of the official languages of the Philippines.[169] Another of the initiatives was spearheaded by the veteran politician Miguel Cuenco, author of the law that carries his name. Aged 82, despite not being a member of the Commission, he submitted a proposal to make Spanish the official language of the Philippines. The proposal included other initiatives, and initially received endorsements from two commissioners: Bishop Teodoro C. Bacani, who would shortly after withdraw his support, and Commissioner Regalado E. Maambong. The Commission had already informed Cuenco that the issue of the national language would not be included in the final report. However, since any Filipino citizen had the right to submit proposals, and since Cuenco had obtained the signatures of two commissioners in support of his proposal, it was read by Commissioner Villacorta, albeit reluctantly.

Cuenco proposed that the peak viewing hours on public television should be used for Spanish-language programmes, and that they should also be broadcast in Latin American countries. In addition, it was proposed that courses in Spanish-language journalism should be given at the UPI, Santo Tomás and San Agustín de Iloílo universities, with the suggestion that assistance be requested from the Spanish government so that the courses would be given at the Cultural Centre of Spain, the

---

[163] *Constitutional Commission,* vol. IV, p. 508 (10 September 1986).
[164] *Constitutional Commission,* vol I, p. 96 (10 June 1986).
[165] *Constitutional Commission,* vol. III, p. 300 (14 August 1986).
[166] *Constitutional Commission,* vol. III, p. 540 (20 August 1986).
[167] *Constitutional Commission,* vol III, p. 226 (12 August 1986). Reference by Commissioner Ople.
[168] *Constitutional Commission,* vol. III, p. 192 (11 August 1986).
[169] *Communication* 947, *page* 849. The vice-chair was the distinguished Filipino academic and writer Guillermo Gómez Rivera, who was in charge of the last Spanish-language newspaper in the Philippines, *Nueva Era,* which shut down in 2008.

predecessor of Instituto Cervantes in Manila. It was also proposed that Spanish be a compulsory subject in the first two years of secondary education in both state-run and private schools. The proposals were rejected.[170]

In Article XIV, Section 7, reference was made to the fact that Spanish and Arabic would be promoted, but voluntarily. The languages into which the Constitution of the Philippines would be translated were discussed from 1 September 1986 onwards.[171] Although there was a majority in favour of translations into Spanish and Arabic, and although translation into said languages is provided for in Article XIV, Section 8, to date no official translation into Spanish has been prepared.

More than 30 years later, when searching for elements that define the Castilian Spanish of the Philippines over the past 250 years, above and beyond the chronology of events, we can find three determining characteristics:

1) Firstly, Spanish has essentially been an urban language in the Philippines. As compared to the rural environment—towns, villages, and shantytowns in the provincial Philippines, where knowledge of Spanish was much more limited—we find that Spanish had spread among the urban population that had received formal education to a high level, or that had access to commercial opportunities, which were not available in the rural environment. As an urban language, Spanish was also the language of the bourgeoisie and of the most influential classes.

2) The second key characteristic is as important as the first: Spanish was a State language, of the founding fathers, as we have already seen. The continuity of the State has been seen as continuity of the language, playing in favour of Spanish.

3) The third fundamental characteristic of Spanish in the Philippines—defining its profile in the 20th century—is the lack of Spanish teachers. The removal of the Spanish language's compulsory status in university education, which left hundreds of Spanish teachers out of work, must have played a determining role in this subsequent scarcity.

The situation started to change in 2008, during the presidency of Gloria Macapagal Arroyo, who announced that Spanish was to be reintroduced as an elective language in the state secondary education system.[172] The year before that, the Agreement on Cooperation in Culture, Sports, and Education was signed by the Kingdom of Spain and the Republic of the Philippines. Article VI of the Agreement stipulates that the two parties, mindful of the importance of their respective languages as means of transmitting culture, shall collaborate to implement tools and programmes for the teaching thereof. A Memorandum of Understanding to Improve and Promote Teaching of the Spanish Language and Culture was signed in February 2010, followed in October 2012 by another Memorandum of Understanding between the Ministry of Education, Culture and Sport, Instituto Cervantes, AECID and the Philippine Department of Education, regarding training in Spanish for secondary education teaching staff in the Philippines.

Within this framework, a Programme of Training in the Spanish Language for Filipino Secondary School Teachers was launched, with the aim of reintroducing Spanish as an elective subject in secondary education throughout the country. A plan

---

[170] *Constitutional Commission,* vol. III, p. 206 (12 August 1986).
[171] *Constitutional Commission,* vol. IV, p. 150 (1 September 1986).
[172] Rafael Rodríguez-Ponga (2009), "Nuevas perspectivas para la lengua española en Filipinas" [New Prospects for the Spanish Language in the Philippines], *Análisis del Real Instituto Elcano (ARI),* 27 (2009).

was established to train a body of Filipino teachers in state-run secondary schools with a knowledge of the Spanish language, to reach a minimum level of B1 under the Common European Framework of Reference, and where possible, a level of B2. By 2017, 610 people had participated in the programme, including some who attended in different years. Face-to-face courses were already offered by Instituto Cervantes, and to this were added refresher courses for teachers offered by Spain's Ministry of Education, Culture and Sport, in collaboration with Menendez Pelayo International University. Some Filipino teaching staff were also enrolled as students in a number of master's degrees in Teaching of Spanish as a Foreign Language and Linguistics at other Spanish universities.

As a result, with a relatively high level of application in a portion of the selected 80 Philippine Ministry of Education schools, and having achieved the reintroduction of Spanish as an elective subject in those schools, teaching of Spanish will foreseeably continue to grow, as it has in recent decades.[173] Given that there is no magical solution to the traditional lack of Spanish teachers in the Philippines in the short term, Spain's continued commitment is essential to remedying this situation. Only a determined policy of support and cooperation will be able to contribute to promoting Spanish in the Philippines. It would be desirable for other nations—such as Colombia, Mexico, and other Spanish-speaking countries with fluid bilateral relations with the Philippines—to be incorporated into the policy in the future.

The Spanish language in the Philippines: New horizons

As we approach the third decade of the 21st century, the Spanish language persists in the Philippines in three very specific areas: 1) in the Tagalog language itself; 2) firmly rooted in certain official authorities; and 3) among the thousands of Spanish speakers, be they native speakers or students of Spanish. We will now briefly examine these three areas.

Firstly, Spanish was amalgamated into the national language of the Philippines. Spanish survives in 20% of its vocabulary, and has been blended into Ilocano, Visayan, Hiligaynon, and almost all of the other languages. In Tagalog there are verb forms that have been preserved in time, lyrics, folklore, expressions in Spanish and other phrases that have translated literally into Tagalog, etc.[174] The lexical legacy from Spanish is one of the common denominators of all of the vernacular languages of the Philippines.

The relationship between Filipino and Spanish can be said to be similar to the trend with Spanish and Latin, whereby speakers identify Latin names as being synonymous with prestige and tradition. Today, familiarity with the Spanish language is reflected in idiomatic Tagalog expressions of all kinds—in literature, in official texts and in day-to-day speech, used by all types of associations, establishments, and institutions: official bodies (Bangko Sentral, Kawanihan Rentas Internas, Sentro Rizal, which are adaptations of Spanish names into Tagalog: Banco Central, Rentas Internas y Centro Rizal); numerous associations (Fundación de Damas Filipinas, Asociación de Damas

[173] Rodríguez-Ponga, op. cit., p. 2.

[174] The key writers who examine this issue are listed on page 73 of the comprehensive work by Antonio Quilis and Celia Casado-Fresnillo: *La lengua española en Filipinas. Historia. Situación Actual. El Chabacano. Antología de textos.* [The Spanish Language in the Philippines. History. Current Situation. Chabacano. Anthology]. Madrid, Consejo Superior de Investigaciones Científicas-Anejos de la Revista de Filología Española, 2008.

Filipinas, Gran Logia Nacional de Filipinas, Casino Filipino, Casino Español, the defunct Asociación de Abogadas Filipinas, Corporación Nacional de Profesores Filipinos de Español, Los Cantantes de Manila, etc.); churches and religious groups (Unión Espiritista Cristiana de Filipinas, Iglesia Filipina Independiente); banks, companies, and commercial establishments (Banco de Oro, Banco de Calamba, Panaderia de Molo, Pan de Manila, Museo Marítimo, Museo de Baler, Las Casas Filipinas de Acúzar, Las Palmas Hotel de Manila); and, of course, educational institutions (Escuela de Artesanías de las Islas Filipinas —in Iloilo—, Colegio de San Juan de Letrán, Ateneo de Manila, Ateneo de Zamboanga, Universidad de Manila, Universidad de San Carlos, Universidad de Santa Isabel, Universidad de San Agustín, Colegio de Santa Teresa, Asilo de San José), among a host of other examples of Spanish naming being used in certain areas, precisely because this underscores their Filipino nature. It is in the context of this survival of Spanish through the Tagalog language that the Philippine Academy of the Spanish Language—whose members include renowned Filipino intellectuals—was able to find its place in the official framework, through collaboration with the Commission on the Filipino Language (Komisyon sa Wikang Filipino).

Secondly, there are instances of Spanish retaining a semi-official specific characteristic, albeit with token status, such as the passing reference in Article XIV, Section 7, of the 1986 Constitution, on voluntary promotion of Spanish and Arabic. The Philippine Naturalization Law remains in place. Section 2, paragraph 5, stipulates that speaking or writing Spanish enables a person to be naturalized as a citizen of the Philippines: concretely, speaking or writing English, Spanish, or one of the principal languages of the country. [175] At least one body of the Government of the Philippines corresponds officially in Spanish with its Spanish-speaking counterparts, namely the National Archives of the Philippines, under the management of Victorino Mapa Manalo. The contact details and letterhead on the official stationary of the Council of Zamboanga is still in Spanish ("República de Filipinas. Ayuntamiento de Zamboanga. Oficina del Alcalde"). In 2013, a Spanish name was officially given to a newly created province: Davao Occidental.[176] The Philippines' Department of Foreign Affairs does not hold Spanish in a distinguished position, but Spanish classes are offered in its Foreign Service Institute, and it is the most popular language alongside Mandarin. One may suppose that the Philippines will choose to make Spanish an essential language for its own diplomatic service, as an additional tool with which to act as a path into Asia for the community of Iberoamerican countries. Lastly, within the Philippine court system, much of the case law was recorded in Spanish until the mid-20th century. As a result, technically, legal professionals are required to have some knowledge of Spanish: enough to be able to interpret and refer to Philippine case law in Spanish. Jurisprudence plays a crucial role, as the Philippines inherited its system of Civil and Criminal Codes from Spain, combining it with the Anglo-Saxon system of common law, inherited from the United States.

Thirdly, in addition to 33,600 students of Spanish in 2016 in the Philippines, there were also 3,000 native speakers of Spanish—461,689 if we include speakers of

[175] Law 473, *Revised Naturalization Law*. Previously, it was essential to speak or write one of the languages of the Philippines in addition to English or Spanish. From the current wording, it is understood that it is now optional: or English, or Spanish, or one of the languages of the Philippines. Consulted at https://web.archive.org/web/20100925151841/http://immigration.gov.ph/index.php?option=com_content&task=view&id=206&Itemid=80 (12 January 2018).

[176] *Republic Act 10360,* signed by President Benigno Aquino on 14 January 2013. The province was given this name to complement the others used in its division in 1967: Davao Oriental, Davao del Sur and Davao del Norte.

Chabacano.[177] There are also other Spanish speakers who are not included in the statistics—those who the Philippines' former Secretary of Education, Andrew González, defined as having "passive ability" in Spanish: people who understand Spanish, but are unable to structure complex phrases in their answers.[178] Furthermore, it should be taken into account that almost all university-educated Filipinos aged over 50 have a superficial knowledge of Spanish, as they studied for the compulsory 12 credits required until 1986. In the preceding course alone (1984-1985), 1.73 million Filipinos were studying at university, and therefore attended 12 credits of classes in Spanish as a foreign language.[179]

In the 20 years between 1996 and 2016, the numbers went from a stable 20,400 students of Spanish, between 1996 and 2006,[180] to the aforementioned 33,600 speakers. The Instituto Cervantes office in Manila, whose enrolments rose from 2,283 in 2001 to 3,697 in 2003, is now the main centre of learning for the Spanish language, and is also second in the Instituto Cervantes network in terms of number of hours per pupil. The teaching system, which is now dynamic and interactive, has changed considerably as compared to the one used when the 12 credits of Spanish were compulsory. [181]

The Instituto Cervantes office in Manila has had two future expansions approved, in addition to a second satellite office in the historical Intramuros neighbourhood, which opened in 2018. In Cebu, whose University of San Carlos teaches Spanish, there is interest in offering Spanish classes at Cebu Normal University, where AECID has been offering a fifth assistantship since 2017, in addition to the four existing posts in four other universities in Manila. This increase has enabled the horizon for action to promote Spanish in the city to be expanded, albeit with difficulties. In this regard, success or failure will depend largely on the different local counterparts being able to make the most of the resources provided by Spanish Cooperation. The conversation assistant programme in the Philippines launched by Spain's Ministry of Education, Culture and Sport, and managed by the Education Office of the Embassy of Spain, is one of the most important assets for the promotion of Spanish, whose survival is crucial. The structural problem when disseminating Spanish has been and remains the lack of teaching staff; to remedy this, the extend period of linguistic immersion offered as part of the programme contributes to effectively training Filipino teachers of Spanish.

In the same way that Spanish gradually lost its prestige in Filipino society as the number of inhabitants who had received all or much of their education in Spanish declined, the dialect of Spanish that survives in the Philippines, now almost as a remnant, will foreseeably disappear as a living language in the next 30 years. However, demand for Spanish as a second language will continue to grow in parallel with the middle class. And there are still millions of Filipinos who have a passing knowledge of

---

[177] *El español. Una lengua viva. Informe 2016* [Spanish: A Living Language. 2016 Report], Madrid, Instituto Cervantes, 2016, pp. 6 and 11.

[178] Andrew González, "The Language Planning Situation in the Philippines", *Journal of Multilingual and Multicultural Development*, vol. 19, n. 5 (1998), pp. 487-525 (esp. p. 518).

[179] The number of university students reported by the Commission on Higher Education of the Philippines is contained in "Philippines-Higher Education", available at: http://education.stateuniversity.com/pages/1202/Philippines-HIGHER-EDUCATION.html. (Visited 25 January 2018.)

[180] Galván, op. cit., p. 163.

[181] Carlos Juan, "El español en Filipinas. Viejos vientos, nuevos rumbos" [Spanish in the Philippines: Old Winds, New Directions], *Perro Berde. Revista Cultural Hispano-Filipina,* 2 (2011), pp. 55-59. Wystan de la Peña, "La enseñanza del español en Filipinas. Repitiendo el experimento, recordando las lecciones" [Spanish Teaching in the Philippines: Repeating the Experiment, Recalling the Lessons Learnt], *Perro Berde. Revista Cultural Hispano-Filipina,* 2 (2011), pp. 60-65.

Spanish: In 2018 the last generation of students to receive 12 credits of compulsory university teaching in Spanish turn 50.

And what can we expect from the coming decades? Spanish will continue to expand, especially if it is advantageous for those studying the language. Paradoxically, learning Spanish today in the Philippines is very lucrative, as knowledge of the language is valued in businesses such as call centres; since there are few speakers with a high level of Spanish, their work is better paid.[182] In this regard, however, a change in the cycle is occurring, which will affect demand for Spanish in the long term: Call centres are changing their business model in response to the advance of artificial intelligence, which in some instances has already replaced human staff.

The evolution of the Spanish language in the Philippines over the coming decades will naturally be tied to the evolution of Spanish in the Americas and in the rest of the world, as well as being linked to the general situation in the Philippines. A crucial role will be played by the Latin American countries with which the Philippines shares strong political alliances and deep-rooted cultural legacies, and with which it is tentatively but increasingly trading—above all Mexico. Mexico, Chile, Argentina, Panama, Venezuela, and (since 2017) Colombia all have embassies in the Philippines, as well as Brazil (where Spanish is a co-official language in several states). At a time of strengthening relations between the Americas and Asia, which in bygone days were wrought by the carracks of Acapulco and the galleons of Manila, the Philippines will find in its Hispanic linguistic legacy another string to its bow as a natural counterpart of Latin America in Asia.

Lastly, the importance of Spanish as an inseparable part of the origin of the Philippine State will live on, as long as the State itself does. The flag of the Philippines features eight sunrays, one for each of the provinces that rebelled against Spain in 1896. The medal of the Order of Sikatuna, the highest of all decorations conferred by the Republic, includes Legazpi's arm, crossed with that of the pre-Hispanic indigenous leader Sikatuna, in remembrance of the Sandugo blood compact of 1565. This is a symbol of the State drawing directly from its past.

In this respect, as Teodoro Kálaw said in 1931, Spanish is, and will continue to be, a testimony to continuity.

[182] Zapico, op. cit., p. 67.

The Chavacano language of the Philippines: Facing the challenges of the 21st century

Carlos MADRID ÁLVAREZ-PIÑER
Instituto Cervantes of Manila

In the Philippines there are approximately 400,000 speakers of the Spanish-based creole language Chavacano (also spelled *Chabacano*),[183] which blends Spanish with Visayan and Malayo-Polynesian languages, as well as others indigenous to the central islands of the Philippine archipelago[184]. For hundreds of years, Chavacano has been passed down from generation to generation, and it is now principally spoken in Zamboanga City, the capital of Mindanao, in the southwest of the Philippines. Different varieties of Chavacano are still spoken in other parts of Mindanao, such as Davao City and Cotabato[185], and, on the island of Luzon, in some areas of Cavite and Ternate [186]

Other dialectical varieties of Spanish in the Philippines, called "kitchen Spanish" or "market Spanish", have also sometimes been identified with Chavacano.[187] In *Voz Española,* Jaime C. de Veyra referred to a vernacular street Spanish, which he termed "a hybrid dialect, called *caló de Cavite,* which Epifanio Santos named *caló ermitense,* and Rizal referred to as *lengua de tienda* [shop language]*, lengua del Parián* [Parián language] *castellano de la Ermita* [Ermita Castilian]*,* and even *Chavacano* in Zamboanga."[188]

However, these are all actually different varieties of Spanish with superficial similarities. In Zamboanga, the Chavacano language arose from a mixture of Spanish with Cebuano and Tagalog. By contrast, the now extinct "kitchen Spanish" or "street Spanish" was what linguists called a *pidgin,*[189] blending Spanish and Tagalog, and which has a more specific and limited sociolinguistic context: commerce and the public sphere, a language that the Chinese- or Tagalog-speaking inhabitants of Manila could use to communicate in that urban setting. Such a pidgin emerges after many years of co-existence involving two different language communities, which develop a third language to communicate amongst themselves. A different situation is that of

[183] The exact number of Chavacano speakers is unknown. The current number must lie somewhere between 308,000, the figure used by the Zamboanga City Council, and 461,689, as stated in the 2010 Philippine national census, cited in the report *El español. Una lengua viva. Informe 2017,* Madrid, Instituto Cervantes, 2017, pp. 7 and 15.

[184] Lojean Valles-Akil, "Malayo-Polynesian Influence on Chavacano Syntax", *The Ateneo de Zamboanga Journal,* vol. 6, n.º 2 (2000), pp. 62-92.

[185] O. Durante, "The Chabacanos of Cotabato City". In *The Ateneo de Zamboanga Journal,* vol. 6, n.º 2 (2000), pp. 38-46.

[186] Mauro Fernández, "Leyenda e historia del chabacano de Ermita (Manila)", UniverSOS: revista de lenguas indígenas y universos culturales, 9 (2012), pp. 65-70.

[187] Antonio Quilis and Celia Casado-Fresnillo, *La lengua española en Filipinas. Historia. Situación Actual. El Chabacano. Antología de textos*. Madrid, Consejo Superior de Investigaciones Científicas-Anejos de la Revista de Filología Española, 2008, p. 429, n. 1.

[188] Jaime C. de Veyra, "*El caló de Cavite*", *Voz Española* (25 July 1931), p. 9.

[189] According to the *Diccionario de la Real Academia de la Lengua Española,* this is a mixed language created on the foundation of another, with contributions of many elements from one or more other languages.

Chavacano, a language that mothers teach to their children, and which lacks a specific social context and is used both in urban and in rural areas.[190]

Chavacano is one of the few creole languages arising from Spanish; others are Papiamento in the Caribbean, and Palenquero in Colombia,[191] to which some authors would add, in addition to Chamorro in the Mariana Islands, the Jopara language in Paraguay, a creole stemming from Guarani and Spanish.[192]

The *Diccionario de la Real Academia de la Lengua Española* (Dictionary of the Royal Academy of the Spanish Language) labels the word *chabacano* as being "of uncertain etymology", but indicates that it has a connotation of bad taste, whether involving a person or a thing. The first recorded use of the adjective *chabacano* in Spanish was in a work by the playwright Diego Sánchez de Bajadoz dated 1545, referring to a sharp object that is cheap and badly made.[193] It is believed that the Chavacano language was given this name because it was considered an incorrect form of Spanish, used by common people, without any verbal agreement or grammatical gender, among other characteristics.

There are no known studies on Chavacano from the Spanish colonial period, although its characteristics were known, with references in the literature to "imperfect Spanish",[194] or to the fact that the inhabitants of Zamboanga only "spoke Spanish, although with odd phrases and expressions", with one source from 1907[195] referring to "corrupt Spanish". [196] It was understood as being a language halfway between Spanish and one of the Visayan languages. Since Spanish was the official language, Chavacano was considered a dialect of Spanish, like the others mentioned previously. Serious Chavacano studies began to appear during the early decades of the 20th century.[197] It had dialectal variations in other parts of Mindanao, such as Davao, Cotabato, and throughout the Zamboanga peninsula. In the small towns of these areas, as well as settlements around Zamboanga City, candidates for municipal elections had to learn

---

[190] Regarding the Ermita and Cavite varieties, according to De Veyra its speakers were thinking in Tagalog but speaking in Spanish, which is why although the vocabulary was Spanish, the grammar was from Tagalog. De Veyra, op. cit., p. 9.

[191] John Lipski, *Las lenguas criollas (afro)ibéricas: estado de la cuestión,* conference at the Universidad Católica Andrés Bello, Caracas, May 1997. Available at: http://www.csub.edu/~tfernandez_ulloa/hle/lipski-lenguas%20criollas%20afroibericas.pdf.

[192] Capucine Boidin, "*Jopara: una vertiente sol y sombra del mestizaje"*, in Wolf Dietrich and Haralambos Symeonidis (eds.), *Tupí y Guaraní. Estructuras, contactos y desarrollos,* Münster, LIT-Verlag, 2006, pp. 303-331.

[193] Sánchez de Badajoz, who used dialect in his works, was active during the first half of the 16th century. He died in 1549, and a collection of his verse and prose was published under title *Recopilación en metro* (Seville, 1554). Madrid, 1886. See the edition annotated by Vicente Barrantes, Librería de los Bibliófilos-Fernando Fé, vol. II, pp. 27 and 37.

[194] José Montero y Vidal, *El archipiélago filipino y las Islas Marianas, Carolinas y Palaos,* Madrid, Imp. y Fundición de Manuel Tello, 1886, p. 399.

[195] Juan Doyle, "Carta del P. Juan Doyle al R. P. Rector del Ateneo Municipal", in Cartas de los padres de la Compañía de Jesus de la Misión de Filipinas, Imprenta de Amigos del País, 1889, vol. 8, p. 125.

[196] Sincero Ruiz, "*Cuestiones Filipinas. La instrucción española y americana"*, *Nuestro Tiempo,* año VII, n.º 93 (10 February 1907), Madrid, pp. 181-193. The Filipino author José Rizal included dialogue in Chavacano in his novel *El Filibusterismo*.

[197] For a thorough list of references from early studies, see Antonio Quilis y Celia Casado-Fresnillo, *La lengua española en Filipinas. Historia. Situación Actual. El Chabacano. Antología de textos*. Madrid, Consejo Superior de Investigaciones Científicas-Anejos de la Revista de Filología Española, 2008. See also John M. Lipski, "*Características lingüísticas del español filipino y del chabacano*", in Isaac Donoso (ed.), *Historia cultural de la lengua española en Filipinas: ayer y hoy,* Madrid, Ed. Verbum, 2012, pp. 307-323 (esp. 318 *et seq*).

Chavacano in order to be viable candidates for office, as the author of the present work verified first-hand in 2005. Chavacano is also spoken, to a lesser extent, in Isabela, the capital of Basilan, an island near Zamboanga.

Although the number of speakers is falling, Chavacano remains one of the principal languages of the Philippines. In a geographically dispersed country comprising more than 7,000 islands, with approximately 120 languages and another 60 dialectal variations, Chavacano ranks 12th of the 19 languages included in the official public school system.[198] The Philippines' linguistic diversity constitutes a vast intangible heritage that is impossible to protect in its entirety, given the economic situation. Despite improvements in recent years, Mindanao still suffered a poverty rate of nearly 40% in the past decade, with a national average of almost 30%.[199] Therefore, this geographic area continues to be a priority for the Spanish Agency of International Development Cooperation (AECID). The displacement of entire communities due to armed conflict and the resulting lack of social cohesion, in addition to the absence of public infrastructure and opportunities for employment and professional development, are all challenges that condition the socio-economic context in which Chavacano is spoken.

The statistical data reflect this drop in the number of Chavacano speakers: from the more than 1 million cited by different authors between 1970 and 1990,[200] to 600,000 in the census taken in 2000,[201], and down to a mere 461,689 in 2016.[202] Chavacano is, therefore, a minority language, subject to pressure from English, Tagalog, Visayan languages, and the indigenous languages of Mindanao. The local variant of Chavacano was spoken in 1995 by 22% of the inhabitants of the town of Ternate.[203] The latest census, taken in 2010, reported that Zamboangan Chavacano was spoken by 308,401 people. Moreover, the number of Chavacano speakers is also falling as a proportion of the total population of Zamboanga. This has led to suggestions that an alternative policy towards Chavacano could be an immersive process of "de-creolization", through which the creole language gradually incorporates the formulations and grammar of the original language. This process has been seen in previous centuries when the creole language and the lexifying language have co-existed for long periods, as occurred in Spanish America, where prolonged exposure to the lexifying language gave rise to the de-creolization process.[204] Efforts that would enable such a policy have already been made in the past. For example, Zamboanga City Council launched a campaign to standardize

---

[198] The other languages in the Philippine Ministry of Education's public school system are: Tagalog, Kapampangan, Pangasinan, Ilocano, Bikol, Ibanag, Cebuano, Hiligaynon, Waray, Tausug, Maguindanaon, and Maranao, with the most recently added being Ivatan, Sambali, Aklan, Kinaray-a, Yakan, and Sinurigaonon, which, along with Chavacano, brings the total to 19.

[199] According to 2008 figures from the National Statistical Coordination Board (NSCB), cited by the ABS-CBN news agency in an article by Jesús F. Llanto, "Anti-poverty official says progress in the South impossible with the conflict and lack of infrastructure", Abs-cbnNEWS.com (7 March 2008).

[200] Yves Boquet, *The Philippine Archipelago,* Dijon, Springer International Publishing, 2017, pp. 160-161.

[201] Anthony P. Grant, "Substrate influences in Mindanao Chabacano", in Claire Lefebvre (ed.), *Creoles, their Substrates, and Language Typology,* Amsterdam-Philadelphia, John Benjamins Publishing, 2011, pp. 303-322.

[202] *El español. Una lengua viva. Informe 2016,* Madrid, Instituto Cervantes, 2016, pp. 6 and 11.

[203] Marivic Lesho and Eeva Sippola, "The Sociolinguistic Situation of the Manila Bay Chabacano-Speaking Communities", *Language Documentation & Conservation,* 7 (2013), pp. 1-30 (esp. p. 12).

[204] John Lipski, *Las lenguas criollas (afro)ibéricas: estado de la cuestión,* conference at Universidad Católica Andrés Bello, Caracas, May 1997. Available at: http://www.csub.edu/~tfernandez_ulloa/hle/lipski-lenguas%20criollas%20afroibericas.pdf.

Chavacano spelling which, by bringing it closer to that of Spanish, helped familiarize Chavacano speakers with the Spanish language.[205]

Over many generations, Chavacano speakers have accumulated a priceless legacy of cultural traditions. Part of its value lies in the language's importance to Zamboangan identity: having a command of Chavacano is a badge of honour for Zamboangans in a frontier region where cultural and national identity are no strangers to armed conflict—the wounds of which are still open.

In an economic situation entailing severe structural challenges (governance, access to basic services, political instability), the administrations of the former Zamboanga City mayors Maria Clara L. Lobregat and Celso L. Lobregat, and of the current mayor, María Isabelle G. Climaco—all from two of the region's most influential political dynasties—have maintained an active policy of transforming Chavacano cultural heritage into a source of opportunities for its inhabitants, and an engine of development.[206] In addition to the goal of improving infrastructure (e.g. the canning industry, port, and airport), is that of promoting cultural and ecological tourism, since the area offers many interesting places to visit, as well as a third kind of tourism: the possibility of learning Spanish as a foreign language. This is because Chavacano speakers are closer to Spanish than any other community in the Philippines with more than 50,000 people. The goal, besides that of preserving Zamboanga's linguistic heritage, is to attract foreign investors (for example, call centres, which find it difficult to fill positions requiring Spanish), as well as to promote a singular kind of tourism, using the slogan "Asia's Latin City". Zamboanga's municipal authorities are currently distributing 20,000 textbooks, absolutely free of charge, to schools in the city and surrounding areas. Textbooks such as *Aprende Kita Chavacano* ("Learn Chavacano") are enabling the younger generation to acquire a level of written and spoken comprehension of the language unprecedented in previous generations, which lacked these materials.[207]

From 2006 to 2008, the Spanish NGO *Humanismo y Democracia* (Humanism and Democracy), and its local counterpart PBSP, participated in a project, with Chavacano as the teaching language, at 42 schools in Zamboanga City and nearby towns to improve educational conditions and combat early school leaving[208], as well as to improve the quality of teaching.

In 2012 the Philippine Ministry of Education relaunched its Mother Tongue-Based Multi-Lingual Education (MTB-MLE) programme.[209] MTB-MLE is based on the

---

[205] Isaac Donoso Jiménez (ed.), *Historia cultural de la lengua española en Filipinas: ayer y hoy,* Madrid, Ed. Verbum, 2012, p. 373. Regarding this close relationship, see Hermenegildo P. Malcampo, "The Influence of Spanish in the Development of Chavacano", *The Ateneo de Zamboanga Journal,* vol. 6, n.º 2 (2000), pp. 19-26.

[206] Official economic statistics on Zamboanga, at: http://countrystat.psa.gov.ph/?cont=16&r=9.

[207] Victoria D. Mangaser and Valeria Fides G. Corteza are, respectively, the authors of Book 1 and Book 2 of the set of free textbooks *Aprende Kita Chavacano*, published by the Local Government of Zamboanga City, School Division Office of Zamboanga City. Also distributed free of charge to students in the public school system is the book edited by Mark Francis Francisco, *Historia de Zamboanga. Maga Lectura,* Local Government of Zamboanga City, 2016.

[208] Projects of the Humanismo y Democracia Foundation, at: http://www.hmasd.org/index.php?option=com_zoo&task=item&item_id=4&Itemid=46.

[209] This educational policy was first implemented in Iloilo—during two periods, 1948-1954 and 1961-1964—and also in Rizal (1960-1966), according to a 2016 report by the Philippine Ministry of Education: http://www.deped.gov.ph/press-releases/mother-tongue-based-learning-makes-lessons-more-interactive-and-easier-students.

concept that students learn more if they are taught in their mother tongue, and Chavacano was fortunate to be chosen as one of the beneficiary languages. The programme comprises two modules. In the first, spanning primary grades 1 to 3, children are taught Chavacano, so that students can improve and attain a consistent level of skill in the language, expanding their communication abilities. In the second module, Chavacano becomes the medium of instruction for non-language classes.

The Manila Instituto Cervantes centre has also been involved in different initiatives to promote the study and use of Chavacano in Zamboanga.[210] In 2000 the conference "Shedding Light on the Chavacano Language" was organized, in collaboration with Ateneo de Manila University. More recently, in 2012, Instituto Cervantes hosted a Zamboangan film series in Manila. The following year, the Instituto Cervantes Board of Administration approved the opening of an extension office in Zamboanga as part of an agreement with Western Mindanao State University (WMSU) and the municipal government of Zamboanga City. Although the agreement went unimplemented due to local budget issues and security problems in the area, all of the parties are fully committed to relaunching the initiative in whatever way possible under the current circumstances. Improving opportunities to learn Spanish as a foreign language in Zamboanga, through the activities of an Instituto Cervantes satellite centre at WMSU, would greatly improve access to studying one of the most demanded (along with Mandarin) languages in the Philippines.

Chavacano is currently considered at risk, but with relative advantages compared with other Philippine vernacular languages that are in imminent danger of extinction. As long as it is supported by the Ministry of Education through the MTB-MLE programme, and protected by Zamboanga City officials, as well as having the resources made available by the government of Spain, it is likely that Chavacano will continue, in one way or another, to be not only one of the most important languages in the Philippines, but also a means of approaching the Spanish language, and therefore a springboard for professional development.

[210] One of its former directors, Mauro Fernández, is a leading expert in Chavacano. A highlight among his many studies, besides what has been cited above, is *Shedding Light on the Chabacano Language,* Vigo, Universidad de Vigo, 2001 (series Estudios en Socioligüística, vol. 2, nº 2).

The economic value of a minority language: Chamorro in the Mariana Islands

Rafael RODRÍGUEZ-PONGA SALAMANCA
Doctor in Philology

Chamorro is the language of the indigenous population of the Mariana Islands, which are located in the north Pacific, east of the Philippines and south of Japan.

It is spoken in the two political territories into which the Mariana Islands archipelago is divided: the Territory of Guam, which is a US possession, where Chamorro is co-official with English, and the Commonwealth of the Northern Mariana Islands (CNMI), which has a legal and political status similar to that of Puerto Rico, and where Chamorro shares official status with English and Carolinian.

It is also spoken in the communities of Chamorros who have emigrated to the United States, especially to California, Washington, Texas and Hawaii.

To write this article, I have relied on the advice of several people, whose opinions and perceptions of Chamorro and of the economy I have sought. These people are the President of the University of Guam, Dr Robert A. Underwood, whom I met more than thirty years ago, in his capacity as Chair of the Chamorro Language Commission; US teacher Marcelo González, from the Northern Marianas; professor Omaira Brunal-Perry, from the Micronesian Area Research Center (MARC) in Guam; Spanish anthropologist Dr David Atienza, faculty member at the University of Guam; professor Rosa Salas Palomo, from the same university, expert in Chamorro; freelance teacher Clark Limtiaco, resident in the USA; Spanish entrepreneur Mari Flor Herrero, resident in Guam for many years; and Spanish historian Dr Carlos Madrid, expert in the Islands, currently the director of Instituto Cervantes in Manila.

Linguistic data

Its speakers call their language *Chamorro*, also spelled *Chamoru or CHamoru*. In recent years, the spelling *CHamoru* is becoming widespread among those most militantly in favour of recovering local culture. The term *Chamorro*—with its spelling variants—is used to refer both to the language and to the people.

The local language is also traditionally called *fino' haya*, i.e. "language of the south/east", "language of here", as opposed to *fino' lago*, "language of the north/west" or "language of the lake", i.e. Spanish.

Chamorro is usually classified as a Malayo-Polynesian isolate, within the extensive family of Austronesian languages. However, the great many elements of Spanish origin existing in modern-day Chamorro has led me to defend, for years, that there was partial creolization and that Chamorro can be classified as a *mixed Hispano-Austronesian language*, even though the very concept of *mixed language* is controversial.

Interpretations of Chamorro elements of Hispanic origin vary widely. Some consider Chamorro to be a purely Malayo-Polynesian language, with mere lexical loans from Spanish, but without any more profound influences; others consider it a Spanish creole or semi-creole language; others, even, as a dialect of Spanish; or, lastly, as a mixed language.

Chamorro, Tetun Dili (Timor-Leste), and Maltese are, according to German linguist Thomas Stoltz, three languages that deserve a differentiated label in linguistic typology, because they are all the result of special phenomena occurring when languages come into contact with each other.

Interest in Chamorro, its linguistic peculiarities and its socio-cultural circumstances led a group of scholars, including myself, to create the Chamorro Linguistics International Network (CHIN) in 2009, located in Bremen (Germany).

In fact, Chamorro has a large proportion of words of Spanish origin in its vocabulary: approximately 50%, which is truly significant. And what is even more striking: there are a great many grammatical elements, such as prepositions, numerals, conjunctions, verb forms, and even articles, functioning freely in current Chamorro, that are of Spanish origin. What is more: not only do we find "grammatical words", but also grammatical constructions deriving from Spanish. Furthermore, Chamorro phonetics and phonology were modified by contact with Spanish, leading to a new delimitation of vowel and consonant phonemes, and the incorporation and acceptance of consonant clusters. I discussed these issues in the book *Del español al chamorro: Lenguas en contacto en el Pacífico* [From Spanish to Chamorro: Languages in contact in the Pacific] (Madrid, 2009).

When I say *Spanish*, I am referring to the Spanish language in its entirety, both geographically and historically. Spanish language elements arrived in the Marianas through different channels, that is, through Spanish speakers from different regions of Spain, as well as from Mexico and the Philippines. Thus, in Chamorro we can also find language features from Mexican and Philippine Spanish, which are not used in Spain.

Therefore, what we now call Chamorro is a language that is clearly distinct from other languages, with a marked personality and of enormous linguistic interest, given the phenomena we can see in it. Firstly, it has an unquestionable Malayo-Polynesian foundation, a legacy of the original Mariana Islander language, and strengthened by elements from the Philippine languages (Tagalog, Cebuano or Pampango); secondly, it has a multitude of elements of Spanish origin in its phonology, morphology, syntax and lexicon; and, thirdly, in recent decades it has increasingly been influenced by English.

Historical data

When did all of this happen? Let us take a look back at history. In 1521, the Spanish ships of Ferdinand Magellan and Juan Sebastián de Elcano reached the Mariana Islands' shores, on the first voyage around the world, the 500th anniversary of which we are already starting to commemorate. This was the first encounter between Europeans and Oceanian islanders. One of the fleet's deckhands, Gonzalo de Vigo, a native of Galicia, lived in the Marianas for several years: he was the first European to live with the Mariana Islanders; what is more: the first European to live in the Pacific Islands.

In 1565, Miguel López de Legazpi, from Guipuzcoa, took possession of the Mariana Islands for the Spanish Crown. And thus began the colonization and evangelization of the Islands, most especially thanks to Blessed Diego Luis de San Vitores, a Jesuit from Burgos, who wrote, in Latin, the first grammar of the Mariana Islander language (1668).

Guam became a location of critical importance on the route between the Americas and Asia. For centuries there was traffic along what was known as the Acapulco Galleon, Manila Galleon, or China Ship trade route, which linked the Mexican port of Acapulco to the Philippine city of Manila, with a mandatory stop at Guam. The galleons carried people, animals, plants, goods, words and ideas, through ongoing intercontinental exchanges sponsored and paid for by Spain.

The first half of the 19th century saw the consolidation of a new, specific and distinct language form, which was neither Mariana Islander nor Spanish, but something new. It was the product of miscegenation between Marianans or Chamorros, Spaniards, Mexicans and Filipinos, which in turn gave rise to Hispano-Austronesian language hybridization. By the mid-19th century, this new language form was thriving. This can be seen very clearly in the *Diccionario español chamorro, que dedica a las escuelas de Marianas* [Spanish Chamorro Dictionary, dedicated to schools in Marianas], written by the Spanish missionary Father Aniceto Ibáñez del Carmen, with the help of a local priest, José Palomo, and printed in Manila in 1865.

Spain's political presence ended with the Spanish-American War. In 1898, Spain ceded the island of Guam to the United States. The following year, in 1899, Spain sold the rest of the Mariana Islands (Saipan, Rota, Tinian, Pagan and other, smaller, uninhabited islands) to Germany, which lost them in 1914, in World War One, and so they fell into the hands of Japan.

In 1941, during World War Two, Japan occupied Guam, and the entire, formerly Spanish, archipelago was then controlled by the Japanese. In 1944 the USA not only recovered the island of Guam, but it also occupied Saipan, Tinian and the other islands, one by one, in hard-fought battles. The last Japanese stronghold surrendered on the island of Anatahan in 1951, and the last Japanese soldier in hiding was found in Guam in 1972, which is proof of the great difficulty involved in controlling territory in the Micronesian islands.

In 1947, the UN created the Trust Territory of the Pacific Islands (TTPI), and granted its administration to the United States, both for the Northern Mariana Islands and for the Caroline, Palau and Marshall Islands. In 1950, Guam ceased to be under military control and entered under civilian administration, reporting to the Department of the Interior.

In 1975, the Northern Mariana Islands obtained Commonwealth status, which was confirmed in 1977 in their Constitution. In 1986, the Commonwealth of the Northern Mariana Islands (CNMI) left the TTPI. Therefore, since then, both Guam and the Northern Mariana Islands have been under US sovereignty.

In 2017, North Korea's threats against Guam—and, therefore, against the entire archipelago—in the context of a new Cold War with the United States, brought to the forefront the international significance of these islands.

Indeed, for centuries, the Marianas have been strategic for the world's stability and security, from a political, military and economic standpoint. This was understood very

early on by Spain's authorities, who maintained their presence in the Philippines, the Marianas and—in the 19th century—in the Caroline and Palau islands, despite the cost involved. It was understood by the United States in 1898, in taking over Guam and expanding throughout the Pacific: it is no coincidence that the Hawaii Islands were annexed that same year. It was also understood by Germany, even though its presence in the region was brief. And it was certainly understood by Japan. World War Two proved that the Pacific is critical to the course of history and world peace.

In all of these developments, the Mariana Islands played a decisive role, but not due to decisions made by their inhabitants, but due to the geostrategic interests of international powers that focused their attention on that part of the globe. In fact, the Chamorros witnessed the arrival of Spaniards, Germans, Japanese and Americans, they suffered wars and hardship, and they also enjoyed the progress and innovations brought by them.

Statistical data: Economy, ethnicity and language

Today, Guam has a population of 161,700 inhabitants, according to official 2015 data from the US Department of the Interior. 49.3% of them (2010 census) are Pacific Islanders. The breakdown by ethnic groups is as follows: Chamorro: 37.3%; Asian: 32.2%; Filipino: 26.3%; Black or African American: 1.0%; White: 7.1%. Their average age is 29.5, as opposed to the average of 36.7 in the USA.

As for economic data, according to the same source, Guam has a GDP of 5.7 billion dollars (2015), and a per capita GDP of 35,461 dollars. Federal expenditure in Guam amounts to 3.3 billion dollars, 2 billion of which are on defence (2015). Tourism, with one and a half million tourists per year, almost half of them from Japan, brings in revenues amounting to 1.6 billion dollars.

The Northern Mariana Islands, on the other hand, have 52,300 inhabitants (2015), 34.9% of whom (2010 census) are Pacific Islanders, with the following ethnic breakdown: Chamorro: 23.9%; Carolinian: 4.6%; Asian: 49.9%; Filipino: 35.3%; White: 2.1%. Their average age is 32.5.

In the Northern Marianas' economy, GDP is 922 million dollars (2015), and the per capita GDP is 17,629 dollars. Public expenditure amounts to 288 million dollars, with 72 million in federal grants. The Northern Marianas receive more than half a million tourists per year: 530,000 in 2016, of whom 37.9% were Korean and 11.9% Japanese. All of these figures are official data published by the US Department of the Interior.

For comparison purposes, we can say that in that same year, 2015, Spain had a per capita income of 28,480, i.e. 7,000 dollars less than the island of Guam, but 11,000 dollars more than the Northern Mariana Islands.

With these figures in mind, it is necessary to make a series of observations to assess the economic weight of the Chamorro language in context. Firstly, the Chamorro do not constitute the islands' majority population—they represent only slightly more than one-third of Guam's inhabitants, and less than a quarter of the population of the Northern Marianas. Secondly, the volume of federal—and, especially, military—activity explains the predominance of English. Thirdly, the importance of tourism means that Japanese and other Asian languages are playing an increasingly important role in the islands'

economy. Fourthly, there are clear differences in the economic level of the two territories: the per capita income of the CNMI is almost exactly half of that of Guam.

An analysis of the statistics (2010 census) of ethnic or racial origin compared with the language spoken at home and the frequency of use of languages also offers interesting data:

GUAM: ETHNIC OR RACIAL ORIGIN

Universe: Total population

Total: 159,358

Single ethnic or racial origin: 144,429

Native Pacific Islander: 78,582

Chamorro: 59,381

Asian: 51,381

Black or African American: 1,540

Hispanic or Latino: 1,201

White: 11,321

Other: 404

Two or more ethnic or racial origins: 14,929

Pacific Islander and other: 11,656

Chamorro and other: 9,717

Asian and other: 8,574

GUAM: USE OF LANGUAGES:

Universe: Population aged five or over

Total: 145,069

Only English: 63,238

Another language other than English: 81,831

Speaks other languages less frequently than English: 21,300

Speaks other languages as frequently as English: 29,057

Speaks other languages more frequently than English: 30,808

Does not speak English: 666

GUAM: LANGUAGE SPOKEN AT HOME

Universe: Population aged five or over

Total: 145,069

Pacific Islands languages: 70,988

Chamorro: 25,827

Philippine languages: 30,720

Other Pacific Islands languages: 14,441

Asian languages: 9,192

NORTHERN MARIANA ISLANDS: ETHNIC OR RACIAL ORIGIN

Universe: Total population
Total: 53,883
Single ethnic or racial origin: 47,051
Native Pacific Islander: 18,800
Carolinian: 2,461
Chamorro: 12,902
Asian: 26,908
Black or African American: 55
Hispanic or Latino: 54
White: 1,117
Others: 117
Two or more ethnic or racial origins: 6,832
Pacific Islander and other: 6,091
Chamorro and other: 4,608
Asian and other: 3,235

NORTHERN MARIANA ISLANDS: USE OF LANGUAGES:

Universe: Population aged five or over
Total: 49,056
Only English: 8,354
Another language other than English: 40,702
Speaks other languages less frequently than English: 7,381
Speaks other languages as frequently as English: 13,476
Speaks other languages more frequently than English: 19,054
Does not speak English: 791

NORTHERN MARIANA ISLANDS: LANGUAGE SPOKEN AT HOME

Universe: Population aged five or over
Total: 49,056
Pacific Islands languages: 32,875
Chamorro: 11,819
Carolinian: 2,466
Philippine languages: 16,100
Other Pacific Islands languages: 2,490
Asian languages: 6,897

It must be underlined that the language data do not coincide with the data on the total population, because the US census only considers people over the age of five to be speakers of a language.

Therefore, the 2010 census showed that there were 37,646 speakers of Chamorro in the Mariana Islands, divided between Guam (25,827) and CNMI (11,819). In percentage terms, speakers of Chamorro represented 19.39% of speakers in the archipelago, divided between 17.80% in Guam and 24.09% in the Northern Mariana Islands.

The census also shows the absolute predominance of English in the Mariana Islands, not as the language spoken at home, but as a language known and used, to a varying extent, by 99% of the population.

We should also add to these statistics the number of speakers of Chamorro residing in the United States.

Ethnologue states that there is a total of 64,300 speakers of Chamorro, 19,800 of whom live in the USA, whereas Wikipedia in English gives the figure of 58,000 speakers. Wikipedia in Chamorro offers a cautious bracket for the number of speakers: "Guåha kasi 50,000 para 75,000 siña manfino'chamoru", i.e., "there are approximately 50,000 to 75,000 speakers of Chamorro". Incidentally, the sentence includes the words *kasi* ["nearly", in Spanish "casi"] and *para* ["to", in Spanish "para"], which undoubtedly show the Spanish grammatical imprint, in addition to the numbers themselves, which are read as *sinkuenta mit* [in Spanish "cincuenta mil"], and *sitenta i sinko mit* [in Spanish "setenta y cinco mil"].

From all of these data we can draw another interesting conclusion: the speakers of Chamorro in the Mariana Islands are considerably fewer than the total number of people who identify ethnically as Chamorro. In other words, most of the Chamorro people do not speak Chamorro at home, but are now only English speakers.

In Guam, 69,098 people identify as Chamorro (as their single origin or in combination with another), representing 43.36% of the island's population (data from 2010). In the Northern Mariana Islands, 17,510 people speak Chamorro, which is equivalent to 32.49% of the islands' population.

In total, 87,608 people identify as Chamorro (as their single origin or in combination with another), but, as we have already stated, 37,646 people over the age of five speak Chamorro at home in the Mariana Islands. That is to say, if we compare both figures directly, fewer than half of the Chamorro people of the Mariana Islands (Guam + CNMI) claim to speak Chamorro at home: exactly 42.97%.

Moreover, the census says that in the United States (that is, the North American continent plus Hawaii), there were, in 2010, 147,798 people who defined themselves as "Chamorro or Guamanian" as their single ethnic origin or in combination with others.

Therefore, the total number of persons in Guam, the Northern Mariana Islands and the United States who define themselves as being of Chamorro origin is 235,406 (2010 census).

Even if they do not speak the language of their parents or grandparents, Chamorro does have an identifying and symbolic value within their ethnic community, and even

among the entire population of the islands. Hence the aspects involving the economic value that we are analysing. Even among those who no longer speak it habitually, the truth is that many understand it partially and use it occasionally, in words, expressions, prayers and songs.

Wikipedia, as an indicator of the use of a language, offers the following information: Wikipedia has 435 pages of content in Chamorro, which makes the language the 274th out of the 288 languages in the world that have Wikipedias. The same list tells us that it has 10,184 users, which is not so bad, but only 11 (eleven!) active users ("users who have performed an action in the last 30 days").

There is also a Guampedia (www.guampedia.com)—a local version of the online encyclopedia—but it is in English, and Chamorro only has a residual position in it.

Chamorro in the Government and in the Administration

Given that Chamorro is a co-official language in Guam and in the Northern Marianas, it plays a role in the public administration. This role is, however, secondary, because English is the dominant language. In any event, the need for civil servants who can speak and write in Chamorro, or who can translate official documents, is, undoubtedly, a source of employment.

Ever since the islands have been under democratic rule and have been able to elect their own Governor, politics has been mainly in the hands of the Chamorro. It takes but one look at the list of Governors of Guam to understand that they are all Chamorro, and some of them have clearly Hispanic names: Carlos Camacho (1971-1975), Ricardo Bordallo (1975-1979 and 1983-87), Paul M. Calvo (1979-1983), Joseph Ada (1987-1995), Carl Gutierrez (1995-2003), Felix Camacho (2003-2011), Eddie Baza Calvo (2011 to the present). In the Northern Mariana Islands, most of them have been Chamorro, except for two Carolinians: Carlos Camacho (1978-1982), Pedro Tenorio (1982-1990 and 1998-2002), Lorenzo De Leon Guerrero (1990-94), Froilan Tenorio (1994-1998), Juan Babauta (2002-2006), Benigno Fitial (2006-2013), Eloy Inos (2013-15) and Ralph Deleon Guerrero Torres (2015 to the present).

As historian Carlos Madrid puts it, "we can say that there are Government posts and positions for which speaking Chamorro is essential", such as Governor, President of the University, or even Archbishop. "Knowledge of Chamorro is a factor that is taken into account when locals apply for certain positions".

Thus, extra points are awarded for knowledge of Chamorro to individuals applying for certain positions of responsibility. However, in reality, both Governments dedicate scant space to Chamorro on their websites. The website of the Office of the Governor of the Northern Marianas is entirely in English, except for the initial greeting, which is in the three official languages: *Hafa Adai, Tirow and Welcome!* The Northern Marianas Commonwealth Legislature website is also exclusively in English. However, an Act was passed in 2004 mandating all of the insular Government departments to have their names—and, therefore, their outdoor and indoor signage and their document letterheads—in Chamorro, Carolinian and English. The website states that only certain positions in said legislature require knowledge of "at least two official languages". As it is a bicameral Parliament, it has a House of Representatives, the Speaker of which is Rafael S. Demapan, and a Senate, whose President is Arnold I. Palacios.

The website of the Government of Guam, which offers all of its official documents (http://www.govguamdocs.com), is exclusively in English. The Guam Legislature website is also entirely in English. Chamorro appears nominally in its official name, Liheslaturan Guahan, as well as in the heading of its official documents and approved regulations, using the following formula: *I Mina'Trentai Kuåttro Na Liheslaturan*, i.e. "The thirty-fourth legislature". The current legislature began after the 2016 elections. Its Speaker is Benjamin J. F. Cruz. The Hispanic imprint is clear.

In the Northern Mariana Islands, Chamorro language and culture policy is the responsibility of the Department of Community and Cultural Affairs, which is home to the Chamorro and Carolinian Language Policy Commission. Surprisingly, its website is only in English. The Government of Guam has a Department of Chamorro Affairs.

Guam History and Chamorro Heritage Day is a holiday that is celebrated on the first Monday in March, with a festival of islander music, dance and cuisine.

Chamorro in education

Chamorro is, however, present in primary and secondary education. Chamorro is truly co-official in formal education, more than in other areas of administrative and public activity. This has given rise to jobs for teachers and, therefore, employment due to proficiency in Chamorro, and to the creation of teaching materials in that language.

The Guam Department of Education (GDOE) has a Chamorro division: Dibision Inestudion Chamoru yan i Espesiåt na Prugråma siha, i.e. "Chamorro Studies and Special Projects Division". The subject of Chamorro Language and Culture is mandatory, with a minimum of 100 minutes per week or 20 minutes per day in the first three years of primary education, and 150 minutes per week or 30 minutes per day in the fourth and fifth years of primary. The law stipulates that Chamorro Language and Culture, together with Guam history, must be taught in one of the three years of middle school, and in one of the four years of high school.

In other words, all children living in Guam, regardless of their ethnic or language origin, receive the same amount of teaching in Chamorro. This is insufficient for Chamorro children, and, conversely, is inconvenient for the children of US and Korean families, for example, who are only in Guam for a few years. This is why St Francis Catholic School, in Barrigada, launched a pilot programme of language immersion for its Chamorro pupils.

Teachers of Chamorro in the Guamanian public system need to have the qualification known as the *Chamorro Language Proficiency Test*, which is administered by the *Kumision Settefikasion Para i Manmaniduka*, i.e. the Commission for Educators Certification.

Some schools have paid special attention to Chamorro, such as the Chief Gadao Academy of Arts, Science and Chamorro Culture; and the Sagan Fina' na' guen Fino' Chamoru Day Care, in Dededo, Guam.

Outside formal education, there are also Chamorro courses for those interested. This is the case of the Chief Huråo Academy of Guam, founded by Anna Marie B. Arceo and Raymond J. Arceo, which has a dozen employees and collaborators. It offers

Chamorro courses for children and adults, language immersion programmes and summer camps, translations, and cultural activities.

There are also online Chamorro classes on the www.learningchamorro.com platform, created by Gerhard Schwab, a professor at the University of Guam, with the support of professors Michael Bevacqua and Rosa Palomo.

In California, specifically in San Diego, there have also been initiatives to organize Chamorro courses.

Despite all this, for decades the perception was that Chamorro hindered people's academic and professional development. Clark Limtiaco has told me: "My parents' generation thought that speaking Chamorro or having a Chamorro accent was a drawback. In economic terms, it was better not to speak Chamorro. Speaking English revealed a lot about a person's level of education."

The insistence on Chamorro being present in the education system is aimed, precisely, not only at increasing children's knowledge of it, but at enhancing its prestige.

Chamorro at University

In primary and secondary school the presence of Chamorro is mandatory and abundant. However, at the university level it is limited to specific studies.

The University of Guam (UOG, or Unibetsedåt Guahan), teaches its courses in English, but has a natural loyalty to the islands' own language. Noteworthy here is the Bachelor of Arts Degree, Chamorro Studies Track, directed by Dr Michael Lujan Bevacqua, which includes, naturally, a course in the Chamorro language; as well as the Bachelor of Arts in Education: Elementary Education with a Chamorro Language and Culture Teaching Specialty, a Degree aimed at training teachers so that they can teach in two languages.

As for postgraduate studies, the UOG offers a Master of Arts in Micronesian Studies, which requires proven proficiency in at least one Micronesian language (e.g. Chamorro) or in another language related to Micronesia's history (Spanish, German or Japanese). The subjects are taught in Spanish, including the subject "Guam/Chamorro Studies".

The UOG also offers a Graduate Certificate in Micronesian Studies, as a one-year programme that includes the subject "Guam/Chamorro Studies". The subject is conceived as a seminar exploring the principal aspects of Guam's history, the cultural survival of Chamorro, its political status and other social, religious and economic issues, but it is not aimed at teaching the Chamorro language.

The Richard F. Taitano Micronesian Area Research Center (MARC), which I visited for the first time in 1985, is also part of the UOG. Created in 1967, it is a centre for research and documentation about the region with particular focus on the history of Guam, the Mariana Islands, and other Micronesian islands. Noteworthy in the MARC is the Spanish Documents Collection (SDC), which is the responsibility of renowned historian professor Omaira Brunal-Perry; and the Micronesian Language Institute (MLI), created for the purpose of promoting study, research and understanding of

indigenous Micronesian languages, with Rosa Salas Palomo, a renowned expert in Chamorro, as its Head Researcher. The Documentation Centre of Chamorro Genealogy has generated considerable interest.

Chamorro plays a symbolic role in the University of Guam. More than a mere vehicle for communication and teaching, it is a hallmark of identity. This can be seen in its motto, which is usually printed in English and in Chamorro: *Ina, Diskubre, Setbe* ("Enlighten, Discover, Serve"); and in the semesters of the academic calendar, which have been given the Chamorro names *Fanuchånan* ("a place for rain", indicating the rainy season, i.e. June to December) and *Fañomnåkan* ("a place for sunshine", indicating the dry season, i.e. January to May), at the initiative of UOG President Robert A. Underwood, "in recognition of our unique seasons and of the Chamorro language". In his message to the university community—published in the *2017-2018 Graduate Bulletin*, in English of course—Professor Underwood, a champion of Chamorro language and culture for decades, used two Chamorro expressions ritualistically at the beginning and at the end of his text: *Hafa adai* ("Hello") and *Biba UOG!* ("Long live the UOG!").

Robert Underwood personally explained this use of words to me, pointing out a key aspect: *"Chamoru plays a minor role in actual terms, but a very high symbolic role. We like to use Chamoru phrases and isolated terms to signal our uniqueness and connections to each other"*.

Lastly, the UOG annually organizes the Chamorro language competition, initially called *Kompetensian Fino' Chamoru*, and more recently, *Inachá'igen Fino' Chamoru*. It is aimed at promoting the use and care of the language, with approximately 60-70 teachers and 700-800 students participating.

Moreover, the Guam Community College (GCC), or *Kulehon Kumunidåt Guåhan*, does something similar. The greeting by the GCC President, Dr Mary Okada, begins with the ritual *Hafa adai*. GCC offers the subjects of Chamorro I and Chamorro II, in addition to English, Japanese, and Sign Language. The College launched a video project to promote Chamorro, called the *Fino Håya Video Project.*

The Northern Marianas College (NMC), located on the island of Saipan (CNMI), offers elementary-level Chamorro courses, aimed especially at the native Chamorro population, to consolidate their speaking and listening skills, their knowledge of grammar, and their writing and spelling. It is noteworthy that these courses are not aimed at teaching Chamorro to people from other communities. The NMC also offers its students courses in Carolinian, Chinese, Japanese, Spanish, and American Sign Language.

In short, the UOG, the GCC and the NMC do much more to promote English and proficiency in the English language among their students, while presenting Chamorro as a colourful distinctive feature, or as a subject in the corresponding studies.

Chamorro in the media

The presence of Chamorro in the media is very scarce. Both in Guam and in the Northern Marianas, the media dedicate space to Chamorro, but only marginally. English is predominant.

There have been some interesting attempts, such as that of the KUAM 610 radio station, which in April 1989 changed its name to 610 Estasion Minagof (literally "Station [of] Happiness", or "Radio Happiness"), and became the first and only station entirely in Chamorro. This format only lasted six years.

Nowadays, in Saipan (CNMI), the KKMP defines itself as the only indigenous-owned station on the island, and a promoter of local culture; therefore, it broadcasts songs in Chamorro. Over the years, there have been radio and TV programmes in Chamorro on different stations belonging to the Islands.

Music in Chamorro is certainly an area of interest. Even though record production is scant, and there are few shows with Chamorro music and dance, it is a sector where the language as such is relevant as an instrument of cultural communication and transmission. However, against all historical and ethnic logic, Chamorro dances have been reconverted into Polynesian dances to be offered to tourists... and to the Islanders themselves.

As for printed press, Guam's principal newspaper, the *Pacific Daily News* (PDN), has for years published a brief section of comic strips in Chamorro, known as *Juan Malimanga* (literally "Juan with rolled-up trousers and sleeves"), after the main character in the series.

The small Catholic press has been the true channel for expression in Chamorro, in the two dioceses: Agaña (Guam), and Chalan Kanoa (in Saipan, CNMI). Chamorro Bishops of these dioceses have often preached and published in Chamorro and included diverse articles and texts in Chamorro in their respective diocesan bulletins. Examples include Monsignor Felixberto Camacho Flores, who was Bishop, and later Archbishop, of Agaña from 1971 to 1985; Monsignor Anthony Sablan Apuron, Auxiliary Bishop since 1984 and Archbishop of Agaña from 1986 to 2018; and Monsignor Tomas Aguon Camacho, Bishop of Chalan Kanoa from 1984 to 2010. Monsignor Camacho was the director of the translation of the Gospels into Chamorro, as well as of several religious publications which, to a great extent, established the prevailing standard. However, the current Bishops are not Chamorro: Monsignor Michael J. Byrnes, Archbishop of Agaña, is from Michigan (USA), and the Bishop of Chalan Kanoa, Monsignor Ryan Pagente Jimenez, is from the Philippines. Thus, it seems that English will inevitably also end up prevailing in the religious sphere. It is worth noting that the Cathedral of Chalan Kanoa offers four Masses on Sundays: one in Chamorro (at 6 am!), one in Filipino, and two in English.

Chamorro in business, trade and tourism

The role of Chamorro in trade is limited to its own community of speakers. The Chamorro use their own language for small exchanges. English is the language of formal trade and business.

Chamorro does not even play a significant role in economic transactions between the islands of the archipelago. According to Mari Flor Herrero, there are really very few economic relations between Guam and the Northern Mariana Islands, but even in the ones there are, all of the formal and legal documents and/or contracts are in English.

On arriving at Guam's Antonio B. Won Pat International Airport, travellers may be surprised to see that the signage is in English and in Chamorro, and that they are pointed

to the *Riklamasion Maleta* ("baggage claim") in order to collect their luggage. Visitors can soon see that, together with English, Chamorro is also present, albeit symbolically, and that words of Spanish origin are still alive.

Shop names give an idea of the prestige of English, with a scarcity of shops with names in Chamorro. Almost all of the shops, restaurants and other businesses have English names, or, with a view to tourism, names in Japanese or in other languages. The website www.visitguam.com shows some Chamorro (or Hispano-Chamorro or Anglo-Chamorro) names of restaurants, such as La Mirenda (evoking *merienda*, the Spanish word for "snack"), Tasi Grill (a combination of English with *Tasi*, the Chamorro word for "sea"), and Tao Tao Tasi (literally, "men of the sea"); of shops, such as Chamorrita Swimwear; of a spa, Island Sirena Spa; of a small inn, Casa de Långet ("House of Heaven"); and of large hotels: Fiesta Resort Guam and Sheraton Laguna Guam Resort.

In Saipan, we find Anglo-Chamorro combinations in hotel names, such as Fiesta Resort & Spa, Kanoa Resort, and Laolao Bay Golf Resort, as well as in the shopping centre La Fiesta Mall, built in 1992, and which closed down in 2004.

Guam's Department of Chamorro Affairs manages the *Sengsong Chamorro*, or Chamorro Village, of Agaña, next to the *Paseo de Susana*, a park comprising a series of Spanish-style buildings, i.e. with white walls and red roof tiles. Chamorro Village also has different shops and eateries, where visitors can purchase handicrafts or eat traditional cuisine. Interestingly, these places have names like Micronesia Jewelers, Dragonfly Keepsake Ornaments, and Love from Guam, that is to say, names in English. The economic activity generated by Chamorro Village is due to its handicrafts and culture, in the broadest sense, rather than to the language itself. In any event, these language features give a special touch to the names of shops and of products for sale.

Chamorro in local festivities

The Chamorro language is present in traditional festivals, based on the Catholic calendar of religious festivities. Novenas to saints and rosaries are normally prayed in Chamorro at home; at times, they even include prayers or songs in Spanish, as an archaeological relic of a past that featured Spanish missionaries.

Novenas may be printed in leaflets or booklets, leading to publishing activity in Chamorro.

In Guam, the festivities in honour of Our Lady of Camarin (*Santa Marian Kamalen* in Chamorro), on 8 December, are particularly relevant, together with other devotions to the Virgin Mary, with their name preserved in Spanish, which are celebrated locally: *Nuestra Señora de la Paz y Buen Viaje* (Our Lady of Peace and Safe Journey, in Chalan Pago), *Nuestra Señora de las Aguas* (Our Lady of the Waters, in Mongmong), and *Dulce Nombre de María* (Sweet Name of Mary, in Agaña). Each village has festivities for its patron saint or the Virgin Mary. For example, San Vicente Ferrer (in Barrigada), San Dimas (in Merizo), San Isidro (in Malojloj), San Juan Bautista (in Ordot), Santa Rita (in Santa Rita), Santa Ana (in Agat), Santa Teresita (in Mangilao), San Dionisio (in Umatac), Blessed Diego Luis de San Vitores (in Tumon), and many others.

The festivities are celebrated with religious activities in which Chamorro culture plays a key role, with traditional cuisine and music in Chamorro. Each one of them

generates, therefore, a small economic movement involving local production. And what is more interesting from a commercial point of view, they attract tourism.

Chamorro and its culture in the United States

It should be noted that the Chamorro living in the United States organize celebrations and festivals to keep alive their sense of community, and their culture, cuisine and music. Although English is the principal language of communication and dissemination, Chamorro has a special value as a hallmark of identity.

The most important of these festivals is organized in San Diego, California. In 2018, it was held on 24 March at the California State University San Marcos campus. The Ninth Annual Chamorro Cultural Festival is organized by CHE'LU (Chamorro Hands in Education Links Unity), an association with a highly significant name in Chamorro, as *che'lu* is the word for "brother". The festival featured the "Sounds of the Mariana" concert, organized by the Sons and Daughters of Guam Club. This year's theme has been *Ta-Silelebra i Lina'la' Ginen i Lengguahi, Hinemlo' yan Kuttura*, or "Celebrating Life Through Language, Health and Culture".

CHE'LU was founded in 2005 in order to keep Chamorro culture alive among young people, and offers classes in Chamorro music, language, dance and healthy habits. At these festivals, people can buy handcrafts, T-shirts and food, and can go to music and dance concerts, all of which means that there is economic activity involving Chamorro.

According to journalist Linda MacIntosh in The San Diego Union Tribune (12 March 2018), the festival was expected to attract some 10,000 visitors. Therefore, in economic terms, if we estimate that each visitor spends an average of 15 dollars, it turns out that the Chamorro festival mobilizes at least one and a half million dollars.

The 2010 census states that in San Diego County there are 5,567 people who identify as Chamorro or Guamanian, and there are a total of 9,792 people of Chamorro origin, on its own or in combination with other ethnic origins. The number 10,000 is significant (in comparison with the population of the islands), but even more significant is the number of 30,000 Chamorros living in the San Diego area, according to Br. Eric Forbes, a Chamorro Capuchin friar, who has pointed out that since 1976 the San Diego Cathedral has an image of Our Lady of Camarin (*Santa Marian Kamalen*), identical to that of Guam, in whose honour there are celebrations featuring music in Chamorro.

This area of California is home to Mariana Islander companies, such as the Guahan Grill restaurant, the Hafa Brown Design Company, and the Lommok Radio broadcasting station.

According to Robert Underwood, "Chamoru is used to symbolically represent connections, but actual use is pretty minimal." The reason for this is clear, as Clark Limtiaco has pointed out to me: "Chamorros living in the United States prefer to speak in English: hardly any of the Chamorros born in the United States speak Chamorro".

Therefore, in commercial or business relations between Chamorros from Guam and from the USA, the Chamorro language plays a marginal role. Entrepreneur Mari Flor Herrero speaks very clearly about this: "Economic activity with Chamorros living in the USA is conducted in English", even though "they communicate with each other in

Chamorro" and "organize festivals, are constantly in touch, and their main focus is their family, Chamorro food, traditions and culture, and helping each other out."

Anthropologist David Atienza perceives certain tension between Chamorros who were born in the USA and those born in Guam or in the Mariana Islands. This reminds him of the tension that existed between the Chamorros from Saipan and those from Guam, due to the "Japanization" of the Saipanese, who collaborated with the Japanese in Guam during World War II.

Chamorro companies in Guam and the CNMI: Joeten and Bank of Guam

Several of the Islands' major companies were founded by Chamorros and may be perceived as "Chamorro companies". Chamorros have great entrepreneurial capability, but that does not mean that they always use the Chamorro language; rather, they predominantly use English in economic activities.

This is the case of Joeten Enterprises, the business conglomerate that was created on Saipan Island by Jose Camacho Tenorio, *Joe Ten* (1923-1993) and his wife, Soledad Dueñas Takai. They began in 1947 with a small beverage store, and little by little they managed to build a major corporate group including grocery stores and supermarkets, real estate and construction firms, as well as automobile repair shops and dealerships (Joeten Motors).

Their son, Norman Takai Tenorio, is the current head of the conglomerate, in which many family members also hold positions. His business activities extend into other economic sectors, such as insurance and shipping, and he also participates in a great many entities and associations.

For its part, the motto of the Bank of Guam (BoG) is "The People's Bank", an allusion to its local origin and its Guamanian management. The Bank's website states: *"Our unique Familia culture is built on the legacy of our Founder."* and *"The Bank of Guam has been alive since 1972 and continues to uphold the legacy of our founder, Mr Jesus Leon Guerrero, to serve the people."*

Note the use of the word *Familia*, in Chamorro: a word of Spanish origin in a text in English. This is a way of reflecting that it refers to the typical family structure of the local culture—warm, extended, friendly, caring—and not to the US model.

Jesús S. Leon Guerrero was a Chamorro who worked at the Bank of America branch in Guam, of which he was an Assistant Director. He realized that banking in Guam needed to adapt to the island's socio-cultural reality. He knew the business well, and an idea came to him. Going door-to-door, he managed to convince family and friends of its worth. And in 1972 he founded the Bank of Guam, with 900 stockholders, to offer financial services run by the island community itself. By 1977 it had become the island's second-largest bank in terms of deposits. In 1980 the Bank of Guam expanded to the Northern Mariana Islands, and in subsequent years, to other Micronesian islands. In 1991, Tony Leon Guerrero, the founder's son, became its President. In 2000, the Bank became the first local business to be listed on the stock exchange. Its founder died in 2002, and his son Tony Leon Guerrero (the President) died in 2005; thus, in 2006 his sister Lou (Lourdes) Leon Guerrero, who had been a member of the local parliament, became the Bank of Guam's President. The BankGuam Holding Company was created in 2011, followed by BankGuam Investment and

Insurance Services in 2016. The Bank's total assets grew by 24% in 2016, to an amount of USD 1.92 billion.

My wife and I had the opportunity to meet the Leon Guerrero family in Guam in 1985: founder Jesús Leon Guerrero, who wrote a most interesting memoir (*Jesus in Little America*, 1998), and his wife, María Eugenia Áflague Leon Guerrero, as well as his son Tony Leon Guerrero and his Spanish wife, Mari Flor Herrero. And I was able to see first-hand how the father had conveyed to his family his vision, his commitment to Guam, and his business-based vocation to serve. Incidentally, I know that some of the Bank of Guam's stockholders live in Spain.

Today, the Bank of Guam is present in six political territories, with 11 offices in Guam, four in the Northern Mariana Islands (two in Saipan, one in Rota and one in Tinian), four in the Federated States of Micronesia (in the islands of Pohnpei, Chuuk, Yap, and Kosrae), one in the Republic of the Marshall Islands (in Majuro), one in the Republic of Palau, and one in the USA (in San Francisco).

The Bank of Guam serves the community with banking and financial services, loans, sponsorships and other activities; and—most important on these islands—with efficient management of official assistance to victims of typhoons. It also sponsors cultural activities, such as the celebration of the centennial of the end of Spain's presence in 1898 (which took place in 1998-1999), and more recently, activities with Chamorro names, such as the *Malesso Fiestan Tasi* (Merizo [town] Festival of the Sea).

Part of the Bank of Guam's success is due to the trust vested in the Leon Guerrero family and their good management. Let's take a look at who is who: The Chair of the Board of Directors is Lourdes A. Leon Guerrero, and the Vice Chairman of the Board is William D. Leon Guerrero. The Board Secretary is Roger P. Crouthamel, the Treasurer is Martin D. Leon Guerrero, and the Board Members are: Frances L. G. Borja, Joey Crisostomo, Patricia P. Ada, Joaquin P. L. G. Cook, Joe T. San Agustin, Keven F. Camacho and Mark J. Sablan. The family relationship and unquestionable Chamorro origin can be seen in most of their surnames. Moreover, Maria Eugenia Leon Guerrero is an Executive Vice President, and Jesus H. Leon Guerrero is Vice President, Relationship Manager of the San Francisco branch.

In 2012, the Bank of Guam's ATMs started giving information not only in English, but also in five other languages: Chamorro, Japanese, Korean, Cantonese and Mandarin. This is because of the importance of Asian tourism, and as a gesture towards Chamorro speakers wanting to raise the profile of their language and use it for different purposes.

All of the Bank of Guam's documents are in English. The Bank conducts all of its work in English. Tony Leon Guerrero himself told me in Guam, in 1998, that it would otherwise be impossible to work, to recruit talent, to inform all of the stockholders, and to ensure access to information by auditors and authorities. He considered Chamorro a valuable language for culture and family, but not for banking and business.

It is interesting to examine the Bank's annual reports, and the message that President Lourdes Leon Guerrero addresses to the stockholders. They contain frequent references to her father, his vision and his philosophy. And they include some Chamorro words. If we look back in time, we can see that the 2016 and 2015 reports end with: *"Thank you and Si Yu'os Ma'asé",* that is, "Thank you" in English and in Chamorro. In the 2014, 2013, 2012, 2011 and 2010 reports she began her message by saying *"Buenas yan Hafa Adai!"* ("Hello, how are you?") and she finished with *"Thank*

you and Si Yu'os Ma'asé". In the 2009, 2008 and 2007 reports she also said *"Buenas yan Hafa Adai!"* at the beginning, and *"Si Yu'os Maa'asé"* at the end, without saying "Thank you" in English. She introduced a change in spelling in the 2008 report, by writing *"Si Yu'us Ma'asé"*. In the 2006 report her salutation was *"Hafa Adai and Greetings from Bank of Guam! Hafa Adai!"*, and she ended with *"Si Yu'us Ma'asé"*. In 2005, she used *"Hafa Adai and Greetings from Bank of Guam!"* and *"Si Yu'us Ma'asé"*. The message in the 2004 report was from Tony A. Leon Guerrero, and he began with *"Hafa Adai!"* and ended with *"Thank You and Si yu'us Ma'asé"*. The 2003 and 2002 reports did not have an initial greeting in Chamorro, but did end by saying thank you in that language: *"Si yu'us Ma'asé"*. The reports from previous years had texts by the Bank's President and Founder, Jesus S. Leon Guerrero: He did not use any words in Chamorro, but started and ended in English. *"To Our Valued Shareholders"* and *"Thank you"* is what he said in 2000.

There is no doubt that Jesus S. Leon Guerrero was a Chamorro and spoke Chamorro, but for business his language was English. His family is also Chamorro, but English is their usual language, not only for business but also in their social and family life. The Chamorro language has the symbolic value of a hallmark of identity, which is reflected in short formulaic phrases of high sentimental value for the community. In any case, its Chamorro nature is a cornerstone of the Bank of Guam's success and of its relationship with the local community.

In 1985, when my wife, Paloma Albalá, and myself were conducting language surveys in the Mariana Islands, we realized that speakers of Chamorro distinguished between the different scopes of application of their language. And, precisely, the banking and business spheres were reserved for English.

The key to this is that in economic activities among Chamorros, the most important thing for them is family, trust, and personal relationships, but not the language. That is why business is conducted in English. When I ask about this, their answers are unanimous.

Mari Flor Herrero, who is very familiar with the Chamorro business world, states: "Definitely, among Chamorros, family, trust and personal relationships matter the most, and they tend to favour each other."

David Atienza offers an interesting take on Chamorro perceptions of family ties, highlighting differences between Chamorro and US views: "Family undoubtedly matters the most. Loyalty to the family (to the extended family) is often stronger than any other tie, and this is often seen as corruption from an American standpoint."

Robert Underwood has stated: "Familia gives you access, confidence and reputation seals the deal; using the Chamoru language is a bonus but not a determinant."

For Carlos Madrid, "family and personal relationships are more important, except for prominent political positions", in which "knowing Chamorro or not counts as much or more (in my opinion)."

English and other languages in the economy of Guam and the Northern Mariana Islands

From all of the above it can be concluded that English is the principal language, both on the island of Guam and on the Northern Mariana Islands, albeit not as a mother

tongue or as a language spoken at home, according to the statistics listed above. But the truth is that those same statistics show that it is the most widely spoken language, to different extents. The number of people who do not speak English is minimal. It is also the dominant language in the education system, in the government and administration, in the media, and, of course, in business and trade. Moreover, its use and importance is on the rise, as confirmed by Mari Flor Herrero and David Atienza, both of them from Guam.

However, the boom in tourism has led—at least in this sector, as noted by Marcelo González—to other languages having a growing presence, maybe even to the detriment of English.

Tagalog, or Filipino, and other languages from the Philippines, have become increasingly prevalent due to the immigration of workers in the services sector (hotels, restaurants and shops). But the language is only used internally by the Filipino community itself, because Filipinos also speak English, and that is the language they use with customers. According to Carlos Madrid, "Tagalog is usually spoken among workers, who, however, avoid speaking it in public, because it hinders their integration."

Japanese is related, to a great extent, to tourists arriving on the islands and to selling products and services to Japanese tourists. There are many direct scheduled flights to Guam from the Japanese cities of Tokyo, Osaka, Fukuoka and Nagoya. Furthermore, tourism is also a source of a number of economic activities and investments. Japanese cars (such as Nissan, Mazda, Honda, Acura, Mitsubishi, Subaru, Toyota, and Lexus) are sold regularly in Guam and in the Northern Mariana Islands, as well as other industrial products. The children in Guam's Japanese community can attend the Japanese School of Guam. Clark Limtiaco, a Chamorro who is a speaker of Japanese, told me that "as a Japanese-speaking Chamorro, I was able to establish good relations with these companies and agencies."

Chinese is another important language for tourism and for business in general. There are direct scheduled flights to Guam or to Saipan from Beijing, Hong Kong, Shanghai, Guangzhou and Taipei.

Korean is of some importance given the number of South Korean tourists visiting the islands. There are direct scheduled flights to Guam and to Saipan from Seoul and Busan. Korean cars, such as Kia and Hyundai, are also sold on the islands.

Lastly, the presence of Russian is also being felt, as a number of Russian tourists have visited the islands in recent years.

Carlos Madrid also highlights the additional impact on education of languages that are useful for tourism: "As a result of this demand for speakers of those languages, there are teachers who teach them as a second or third language." Thus, students aspiring to work in the tourism industry (as hotel receptionists, as servers at restaurants, or as tourist guides) can have new opportunities.

Over and above tourism, professor Underwood believes that *"Japanese and Chinese are used by learners of those languages for the specific purpose of conducting business."*

Lastly: What about the Spanish language?

Does Spanish play a role in the economy of Guam and the Northern Mariana Islands?

To begin with, Spanish is present in the education sector, as a foreign language, which generates a certain degree of economic activity due to courses, examinations, and jobs as Spanish teachers.

The University of Guam is an examination centre for the Diploma in Spanish as a Foreign Language (DELE), which is organized and designed by Instituto Cervantes, a Spanish public body. To this end, the UoG has signed an agreement with said body. Professor David Atienza, a Spaniard who has been living in Guam with his wife and children for years, is responsible for the DELE. The UoG is the only DELE examination centre in the entire region of Micronesia. For this purpose, it reports to Instituto Cervantes in Manila, which is the regional hub for activities in the Philippines, Malaysia, Singapore, Indonesia, Vietnam, Taiwan and Guam.

Spanish is taught at a number of schools in Guam, such as St. John's school, which offers its students Spanish, Japanese, Chinese and French; the Academy of Our Lady of Guam, which offers Spanish and Japanese; and Father Dueñas Memorial School, which also teaches Spanish and Japanese. Likewise, Spanish is offered at several schools in Saipan (CNMI), such as the Northern Marianas College.

Secondly, in business and trade, Spanish is represented by the company Lorea Industries dba Barcelona Lane (in which "dba" means "doing business as"), whose owner and promoter is the aforementioned Mari Flor Herrero, a highly talented and driven woman, who, when I met her in Guam in 1985, was selling Spanish luxury brand products (Loewe and Lladró), and is currently importing quality Spanish wines, such as Torres. Obviously, her conversations with Spain are in Spanish; in Guam, she conducts business in English.

Beyond such activities, Spanish is not a relevant language in the economy of Guam and the Northern Marianas today. It could be if Spanish-speaking tourism (from Spain or Mexico) increased, because that would give students of Spanish new motivation.

However, despite the islands' history, it is evident that Chamorro cultural nationalism has chosen to seek its identity in the peoples of Oceania, looking towards the Polynesians—who never lived in the Marianas—instead of towards the Hispanic world. Professor Marcelo González states that "certain Chamorros are very opposed to Spanish, so much so that they do not want to acknowledge the Hispanic influence on their language because it does not support the idea of a strong and independent Chamorro." For his part, Clark Limtiaco, a Chamorro who has lived in California and in Mexico, is seeking to restore the idea of Hispanic identity among Chamorros.

Lastly, it should be noted that the 2010 census showed that there were 1,201 Hispanics (indicating *Hispanic or Latino*, as their ethnic origin) resident in Guam, and 54 in the Northern Mariana Islands. Although this does not reflect the number of Spanish speakers, it does at least show that there are more than a thousand people of Hispanic origin, although Chamorros themselves and a great many Filipinos could also proudly claim Hispanic or Latino origin.

In fact, when Professor Robert Underwood was Guam's Representative to the US House of Representatives, in Washington DC, he became part of the Congressional

Hispanic Caucus (CHC). And today, the Northern Mariana Islands Representative in Washington, Gregorio Kilili Camacho Sablan is also a member of the CHC. These political gestures have cultural significance: in Washington, Chamorros are Hispanic.

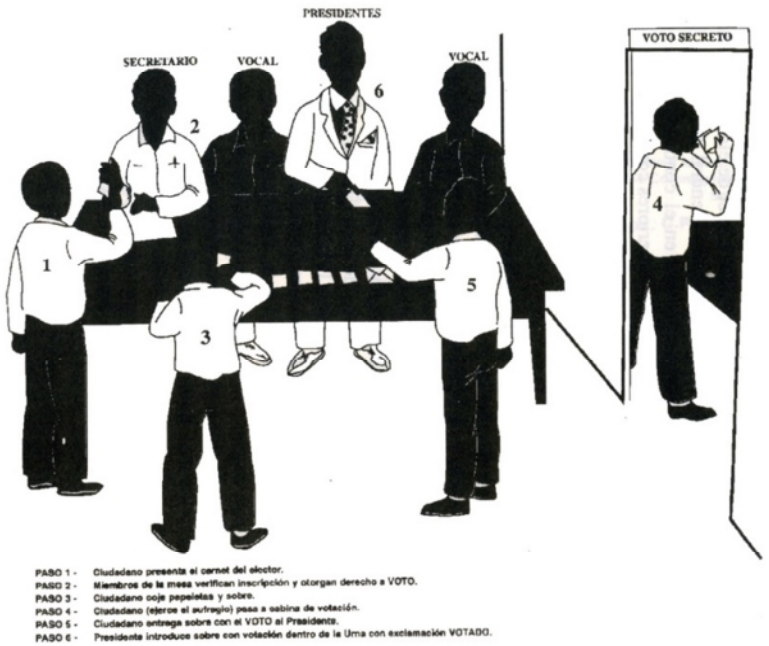
Illustrations

Promotional brochure from COCIHEG (Hispanic-Equatoguinean Official Chamber of Commerce and Industry)

Ekos magazine, bilingual advertisement in Spanish and French.
N.º 055 (Feb. 2017): 56

Cartel de llamada a las urnas.

African studies, 1999-2000. Vol. XIV, n.º 25-26: 100



Cartel anunciando la composición de las mesas electorales y el procedimiento de votación.

Multilingual sign in Aruba

News blog
www.kikotapasando.com

KIKO TA PASANDO
Notisia i informashon gratis i veridiko di Bonbo plant'i man

Online magazine in papiamento
www.vigilantekorsou.news, August 2015

P OF THE WORLD ACCORDING TO WR

m the Neweſt and the moſt Exact Obſervations together with a view of the General and

With other Conſiderable Inprovements &c. By Rich^d Mount and Tho. Page on Great Tower Hill London.

GOBIERNO DE ESPAÑA
MINISTERIO DE ECONOMÍA Y EMPRESA