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CREATING LIVING SPACE AGAINST  
SOCIAL EXCLUSION: THE EXPERIENCE OF  
SAMA-BAJAU MIGRANTS IN  
DAVAO CITY, THE PHILIPPINES

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**Creating Living Space against Social Exclusion:  
The Experience of Sama-Bajau migrants in Davao City, the Philippines**

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**Abstract**

In Davao City, the Philippines, ethno-linguistic and cultural diversity are officially treated as resources. However, the Sama-Bajau (a mixed group of Sinama speaking peoples, more commonly referred to as the “Bajau” in the local context) are largely perceived by non-Sama-Bajau populations as the least privileged people, and sometimes even mentioned as “uncivilized,” partly because of their image as beggars/divers as well as a popular discourse about their “having no religion.” With such paradoxical reality, I will attempt to bring together sets of data I gathered from 1997 to 1999 in order to achieve two objectives. The first objective is to find out what kind of living space(s) Sama-Bajau migrants have created in Davao City. The second objective is to explain variations in the living space(s) found among them, applying the concept of social exclusion in development studies.

In this working paper, I will first describe the life of Sama-Bajau migrants in the research site. Second, I will attempt to find the reasons for adaptive variations among Sama-Bajau migrants, applying the analytical framework of social exclusion in development studies. Third, I will try to analyze the reasons for the characteristics of the space(s) created by the Sama-Bajau in Davao City at a deeper level, comparing the present case with two other cases, the Sama Dilaut and the Olang Alsi, in Malaysia.

Finally, I will present two implications delivered from this study: 1) the predicament of the Sama-Bajau in Davao City may in part echo an institutional bias that the Philippines as a nation-state has had as part of its political structure; and 2) if so, a remaining question is who should/could be responsible for social policy in the Philippines to mitigate the social exclusions from which poor ethnic minorities like the Sama-Bajau suffer. Thus, as a next phase of my ethnographic study, I will continue to explore the role of faith-based development organizations, especially Christian missionaries (Pentecostals), as well as the meaning of the lived experience of Sama-Bajau converts from their own perspectives.

## Introduction

This paper depicts the story of the lives of some people living in Davao City, the Philippines, generally referred to as the “Bajau,” but whom I prefer to call the “Sama-Bajau” as a more academic term<sup>1</sup>. The bulk of the data I use to relate this story was collected from 1997 to 1999 through fieldwork, and indeed was analyzed more than a few times, of which results were published in forms of academic papers (Aoyama 2006; 2010a; 2010b; 2014a). To start this paper, I must say something about why I was moved to try to revisit the previous data from the present. The following episode prompted in me a few questions about the concept of public spheres as well as the categories of majority and minority in order to understand the contemporary Philippines.

One day in March, 2013, I came to Davao City to say good-bye to my friends before leaving for the United States for a ten-month fellowship, and I happened to meet a Sama-Bajau woman named Almarya<sup>2</sup>. Almarya earnestly tried to teach me six languages despite the fact she was unable to communicate in Cebuano<sup>3</sup>, let alone Filipino<sup>4</sup> and English<sup>5</sup>. Since she herself did not know how to write, she would repeat words and phrases in those languages and instruct me to write them in my notebook and

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<sup>1</sup> The Sama-Bajau constitutes one of the more distinctive maritime populations in Insular Southeast Asia. According to Nagatsu Kazufumi, the total Sama-Bajau population is approximately 1,100,000 (Nagatsu 2010; Nagatsu 2013). It is known that the self-identifications of Sinama-speaking people, as well as the names that other ethnic groups around them use to call them, vary widely and change dynamically according to the situation they are in. Some Sama-Bajau groups lived in boats and were known in the academic literature as “Bajau Laut” in Malaysia and the “Sama Dilaut” in the Philippines. See Nimmo (2001), Sather (1997), Nagatsu (2004), and Aoyama (2010; 2014a). The Sama-Bajau in the present paper include both land-based Sinama speakers and those with direct experiences or at least with memories of their parents and relatives living in boats at the time of my fieldwork. The term “Bajau” was originally used by dominant Ethnic groups in the Sulu Archipelago to refer to the Sama Dilaut (Nimmo 2001). However, it has been adopted by the Sama-Dilaut migrants to present themselves towards non-Bajau populations in Davao City. Non-Bajau populations generally use this term, with or without a derogatory sense, to refer to the Sama Bajau.

<sup>2</sup> For reasons of confidentiality, I have changed the names of the individuals and those of their communities and places that appear in this paper.

<sup>3</sup> The Cebuano language is a lingua franca in the Visayas and Mindanao of the Philippines.

<sup>4</sup> The Filipino language is the national language and one of the two official languages of the Philippines.

<sup>5</sup> The English language is one of the two official languages of the Philippines.

then read them aloud to her so that she could check the correctness of what I had learned from her. We were both short-time visitors at the house of a Sama-Bajau pastor that night; she came from Zamboanga City, one of the places of origin where Sinama speaking residents around the pastor's house came from; and I came originally from Japan, but that particular day, I visited the area from the Christian-Cebuano community, or the mainstream society, of Davao City. Her language lessons were given in the living room, and a male in-law of the Pastor occasionally interrupted us, asking me to teach him Japanese phrases that he could use to attract potential customers to his business selling pearls at beach resorts. He also suggested that I use my mobile phone to record our lessons so that taking notes would be no longer necessary. Later that night, the Pastor's daughters came back from a concert held in a park. They joined us in the living room, pulled out their mobile phones, and started calling up their relatives to share their excitement, speaking thoroughly in their own language, Sinama.

What was puzzling was not the fact that the Sama-Bajau visitors like Almarya and sons and daughters of the Sama-Bajau migrants like her relatives in Davao City maintained their own language; Davao City is after all characterized with the history of migrants from other areas of the Philippines as well as from abroad (Hayase 2008; Abnales 2011), and indeed, it officially prides itself on its ethno-linguistic and cultural diversity. What puzzled me was the quality of the space that we, my Sama-Bajau friends and I, shared in the living room of a stilt house built over the shore. Despite the physical proximity of their house to the center of the city, what I felt then was that there seemed to be a large gulf between the space I usually enjoyed with my Cebuano/Filipino and/or English-speaking local friends from different income classes and the one that emerged in front of my eyes at that night. Such an apparent exclusion of the Sama-Bajau migrants from the wider community confused me about the concept of the public sphere within the Philippines, which is said to be a country where ethnic lines are not as important as in other countries in Insular Southeast Asia (Anderson 1998). More recent political studies on the Philippines also suggest that there are "dual public spheres" which have been formed according to the socioeconomic status, rather than ethnicity, namely the poor (low-income class), Tagalog/Filipino-speaking citizens and middle class, English-speaking citizens (Kusaka 2013).

In Davao City, while ethno-linguistic and cultural diversity is officially treated as its resources, for example, for tourist attractions and celebrated in forms of cultural events such as *Kadayawan Festival* and *Araw ng Davao*, the Sama-Bajau are largely perceived by non-Sama-Bajau populations as the least privileged people, and sometimes, even mentioned as “uncivilized” ones partly because of their image as beggars/divers as well as a popular discourse about their “having no religion”<sup>6</sup> (world religions such as Islam and Christianity).

With such paradoxical reality, I will attempt to bring together sets of data I gathered from 1997 to 1999 in order to achieve two objectives. The first objective is an empirical one. It is to find out what kind of living space(s) the Sama-Bajau migrants have come to create in Davao City. The second objective is more theoretical in nature and seeks to explain the variations of the living space(s) found among the Sama-Bajau migrants in the Philippine urban center, applying the concept of social exclusion in development studies.

The organization of the paper is as follows. The first section briefs the facts on life of the Sama-Bajau migrants in the research site, using objective indicators and subjective evaluations. It reveals that there were variations of adaptation among the Sama-Bajau to the urban market society. The second section attempts to find the reasons for such variations, applying the analytical framework of social exclusion/inclusion put forward by Naila Kabeer (2004), focusing on three out of the five subgroups. It tries to explain the different interactions between the three subgroups of the Sama-Bajau migrants and the institutional rules in order to see how each group struggles to secure material redistribution and recognition of their group identities. The third section intends to analyze the reasons for the characteristics of the space(s) created by the Sama-Bajau in Davao City at a deeper level, comparing the present case with a case of the “official” Islamization of the Sama Dilaut (the Sama of the sea) in Sabah, Malaysia by Kazufumi Nagatsu (2004) and a case of Orang Asli’s experience with school education in Negeri

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<sup>6</sup> A study on the Sama-Bajau migrants in Illigan City pointed out the existence of the same type of discourse. See Bracamonte (2005).

Sembilian, also Malaysia, by Toshihiro Nobuta (2008). The paper concludes with a summary, implications and future research perspectives.

## **1 Life of the Sama-Bajau in Davao City, the Philippines, 1997-1999**

### **1.1 Overview of the research site**

Davao is a multiethnic city, with a majority Christian population, mostly speakers of Visayan languages including Cebuano (the lingua franca in the city). When I first visited the city as a Ph.D. candidate majoring in Development Economics, professors and NGO workers from the mainstream Christian society suggested that I should visit Muslim-inhabited depressed areas because the Muslims should be, from their perspectives, more depredated upon than Christians in general. Such advice brought me to the research site located in a depressed area called Isla Bella along the coast of the Davao Gulf. Isla Bella is known for its relatively high density of Muslim populations. However, it turned out that the Muslims in Isla Bella were not necessarily poor, and indeed they believed that the Bajau should be considered the poorest, the Bajau who do not practice Islamic faith, though many Christians mistakenly consider them “Muslims.”

When I started my first fieldwork in 1997, the Barangay Captain and most of the Barangay Councilpersons controlling Isla Bella were Maranao, one of the major Muslim groups in Mindanao. From 1998 to 1999, I conducted my first household survey in Isla Bella. The data was collected from all “Bajau” households (Sama Dilaut and land-based Sama other than Sama Laminusa who insisted they should be considered as different from the “Bajau” for religious and other reasons) in Isla Bella and also from the non-Bajau households (Maranao, Tausug, Cebuano, and Sama Laminusa) in the two areas adjacent to the Bajau-inhabited areas. It was particularly easy to locate one of those Bajau-inhabited areas, called *Macao*, because of the particularity of their thatched houses built over the shore, while the other one, *Pikas*, stood rather invisibly with a less clear boundary than their non-Bajau neighbors. The Bajau households covered by this survey were a total of 184, while the non-Bajau ones counted 180.

The results of the 1998/1999 household survey in Isla Bella revealed that the Bajau were more disadvantaged in most of the socioeconomic indicators than their neighbors from other ethnic groups. Their educational attainment was also significantly lower with the average of 1.2 years (0 year in mean) among the males and 0.9 years (0 year in mean) among the females respectively. Aside from such exceptionally low educational attainment in contemporary urban Philippines, the variation of their economic activities was not only limited but also rather specific to the Bajau to the extent that some of the activities like begging (typically found among the elders, females and children) and “ukay-ukay” (peddling secondhand clothes, predominantly found among females) became emblematic of their ethnicity. Most of the males of an income earning age claimed to be fishermen. However, the productivity of their fishing operations was generally low, and they did not earn enough to support their households. Some males abandoned fishing and became shell and pearl venders, while quite a few females sold “ukay-ukay” to make money. The respondents usually stressed that the Bajau were all hard working, but their income levels were not only small but also subject to day-to-day fluctuations. Aside from income and expenditures, the Bajau households in general also showed a substantial disadvantage in access to both formal and informal credit markets, housing facilities, and the possession of durable goods than other ethnic groups.

Other than such “material-based” disadvantages, the Bajau suffered “identity-based” disadvantages<sup>7</sup>. The results of the survey that I conducted on the inter-ethnic group images in 1999 among the same sample of the 1998/1999 household survey showed the non-Bajau respondents tended to attribute the predicament of their Bajau neighbors primarily to the Bajau’s own defects in norms and values, which they believed led to their “lazy” way of life. The negative image about the Bajau were associated with the lack of “cleanness,” “knowledge,” “diligence,” and “religion.” Asked what would be needed for the Bajau to improve their standard of living, non-Bajau respondents suggested economic activities, education of the children, and value formation through

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<sup>7</sup> The terms “material/resource-based advantages” and “identity-based advantages” are borrowed from Naila Kabeer’s paper on social exclusion/inclusion which I shall refer to in section two of this paper. See Kabeer 2004.

group consultations. Put another way, these responses can be interpreted to reflect the popular discourse that the Bajau would not be able to achieve upward social mobility unless their culture and values were changed to become more “civilized” (Aoyama 2006). It should be also noted that that very few respondents related the Sama-Bajau’s sufferings to the socioeconomic structures of the surrounding society, or the governance of the state and/or local governments.

## **1.2 Variations in adaptation within the Sama-Bajau community to the urban market society**

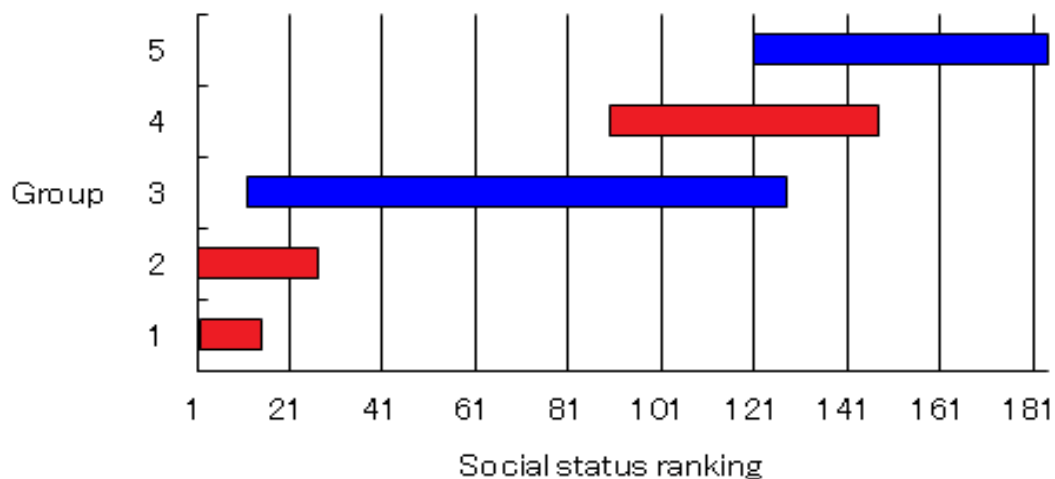
According to the categorization of majorities and minorities in the nation-state by Anderson (1998), the Sama-Bajau in Davao City could be considered to belong to the third category, those who would not even count as an ethnic group due to their powerlessness, which is related to the nature of their community; small in numbers; evenly poor; and therefore, too little social stratification to have their political representatives. Indeed, local authorities and NGOs often would assume that the “Bajau” homogenously belong to the poorest of the poor in Davao City. The results of the household survey in which we employed standard questions used in the census designed by the National Statistics Office (NSO) then supported their views to a certain extent; the Bajau (Sama-Bajau) were the most disadvantaged ethnic group in our sample. But in fact, the Sama-Bajau community had experienced diversification in the adaptive process to the urban economy, resulting in growing internal disparity, which neither the census nor our questionnaire survey could grasp; the intra-group relations among the Sama-Bajau were much more inhomogeneous than an outsider might expect.

In order to prove such diversification, we conducted research on social status by collecting data on a subjective scale of social order among the Sama-Bajau respondents in 1999. The results suggested that social status of each household should be presented not as the rank of the household in general, but as the rank of the group where the household belongs. The twenty raters we selected by gender, age, place of origin, livelihood, and income brackets were confused when we asked them to sort the individual households according to whatever criteria they might think relevant to



arrange those households from top to bottom; instead, they found it much easier to rank them by group that the raters recognized within the community. This finding appeared also rather counterintuitive to the outsiders who might imagine that there should be a rather monolithic community of the Sama-Bajau, however loosely organized it might be. The results of our study indicated the Sama-Bajau community can be divided into five groups as the respondents themselves pointed out (as shown in Figure 1). The five groups distinctively differed in livelihood. In each group, there were visible leaders in each category of their socioeconomic life (e.g. fishing, religious activities and traditional medicine), but there was no leader who could integrate the five groups as a political entity.

Figure 1 Five Groups within the Sama-Bajau community in 1999



Source: 1999 social inequality survey conducted by the author.

The research also showed that top two of the five livelihood groups were originally land-based Sama. Given the historical background<sup>8</sup>, therefore, it was not surprising that they had a relative advantage in socioeconomic status over the three groups in the lower ranks. However, it should also be noted that there was an increasing gap in economic standards of living and lifestyles between the third group and the fifth group, though they both identified themselves as the sea-based Sama (Sama Dilaut) from about the

<sup>8</sup> For more details on the historical transformation of ethnic relations among the Tausug, Samal (land-based Sama) and the “Bajau” (Sama Dilaut), see Warren (1981).

same places of origin. Cross-checking the criteria for higher social standing and the socioeconomic characteristics obtained in our earlier household survey, we found out that the third group had a number of the Sama-Bajau converted to what they called “born-again,” or Pentecostal Christianity. On the other hand, the fifth group, or the lowest group, still adhered to indigenous beliefs (*mboq*, or ancestor-worshipping and animism), but was gradually forced to see the degradation, or abandonment even, of the rites due to financial constraints.

In this research, we also tried to search for the factor that the Sama-Bajau themselves consider as criteria for higher social status, or in other words, better subjective adaptive being to the urban market society. The results indicated that higher social status was associated above all with material possessions (e.g. better housing conditions and the possession of durable goods), availability of cash and cashable jewelry, and sufficient supplies of food. Criteria for higher social standing also related to two different sources of income, namely participating in relatively gainful economic activities (mostly non-fishing activities), and receiving aid from outside the community (e.g. government agencies, evangelical missionaries)<sup>9</sup>.

On the other hand, having social networks to rely on at the time of crisis, savings, credit, ability to make plans, educational attainment were given little appreciation. These are components that the government agencies such as CSSDO (City Social Services and Development Office) appeared to promote to help the Sama-Bajau improve their socioeconomic standing; but they did not seem to be major concern of the Sama-Bajau then. Finally, criteria for higher social status also included being converted to born-again Christianity. Other first-hand data we collected suggested that evangelical missionaries would provide the “Christian Bajau” with food and other basic needs, of which amount and frequency well exceeded the assistance that the government agencies gave rather sporadically (Aoyama 2010b). It was the Sama-Bajau pastors who played an important role in distributing them among their members. Such facts together perhaps partly contributed to the growing sense of material-based difference in their social status

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<sup>9</sup> It should be noted that “receiving aid from others” was listed as one of the criteria for lower social standing in Lynch’s classical study on social class in a Bikol town (Lynch 1959).

within the community.

## **2. Analyzing the variations within the Sama-Bajau community by using the concept of social exclusion**

### **2.1 Analytical framework**

#### **(1) The concept of social exclusion**

In this section, I will attempt to explore the mechanism that could explain the variations of adaptive beings among the Sama-Bajau in Davao City, which were revealed in the early section (1.2). Through this analysis, I would like to raise a question on the common, but rather derogatory discourse on the poverty of the “Bajau” in the urban centers of the Philippines: “they are poor because they are lazy”; and “they are poor because their culture is backward.” Put another way, I will try to show that their poverty happens in relational processes in which they interact with other ethnic groups through institutions that distribute resources and values. In order to pursue these research objectives, I will employ the concept of social exclusion.

In his paper written for the Asian Development Bank on the concept, application and scrutiny of social exclusion, Amartya Sen mentions that the root of the concept lies in the initiative of Lene Lenoir (Secrétaire d’Etat a l’Action Sociale of the French Government) and that flourishing literature followed Lenoir’s original initiative mainly in Europe by the end of the 20<sup>th</sup> century (Sen, 2000). Having tried to examine critically the idea of social exclusion, particularly in the context of deprivation and poverty, Sen remarked that “if the poverty is seen as deprivation of capabilities, then there is no real expansion of coverage, but a very important pointer to a useful investigative focus.” He pointed out that the nature of poverty analysis could substantially benefit from the insights provided by the perspective of social exclusion, stressing its forceful pointer to multidimensionality of deprivation and its focus on relational processes (Sen, 2000, 44-45).

In the same paper, Sen investigates two particular distinctions of social exclusion,

namely constitutive relevance and instrumental importance. Being excluded from something can sometimes be in itself a deprivation and this can be of intrinsic importance on its own, and this is what he calls the instrumental importance of social exclusion. On the other hand, there are relational deprivations that are not in themselves terrible, but can lead to other deprivations. Such types of social exclusions that could lead to impoverishment of human life through their causal consequences are called constitutive importance (Sen, 2000, 12-13). In addition, he also stressed the importance of the distinction between active exclusions and passive exclusions (Sen, 2000, 14-17).

Sen considers it particularly important to recognize the diverse ways in which social exclusion can cause deprivation and poverty. Some examples include (1) inequality and relational poverty, (2) labour market exclusions, (3) credit market exclusions, (4) gender-related exclusions and inequality, (5) health care, and (6) food market and poverty (Sen, 2000, 40-44). In his concluding remarks, Sen wrote, “what is important to study is the linkage between exclusions in different spheres of inter-individual, and interfamily interactions, involving both overlap and casual linkages” (Sen, 2000, 45).

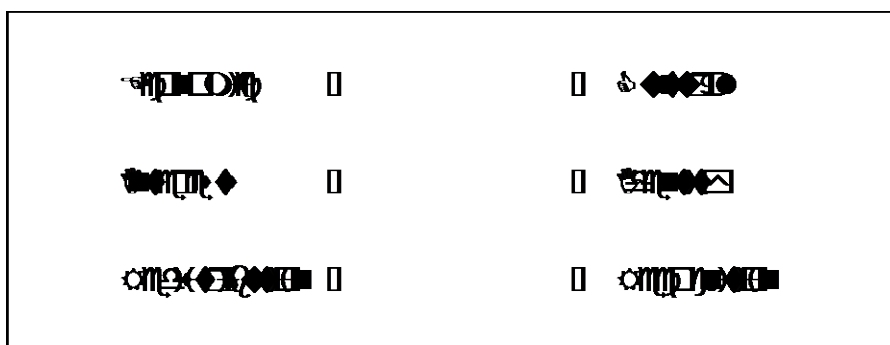
Around the same time as Sen’s paper was published, Naila Kabeer also scrutinized the meaning of adding the concept of social exclusion to the previous literature on poverty, especially from the perspective of development studies (Kabeer 2000). She pointed out that despite the number of previous works, they seldom throw light on what was distinctive about the concept of social exclusion because they tended to use the concept in different ways in which it was interpreted and operationalized in different countries; the term came to be used to refer to problematic groups, problematic conditions, and problematic processes (Kabeer 2000, 83).

Notwithstanding these cautions, Kabeer stood in favor of keeping the concept for social policy analysis for many reasons including the following: (1) “it captures an important dimension of the experience of certain groups of being somehow ‘set apart’ or ‘locked out’ of participation in social life”; and (2) “a focus on processes of exclusion is a useful way to think about social policy because it draws attention to the production of disadvantage through the active dynamics of social interaction, rather than through

anonymous processes of impoverishment and marginalisation” (Kabeer, 2000, 84).

While Sen explored the notion of social exclusion in relation to freedom deprivation, Kabeer (2000) found that Fraser’s analysis (Fraser 1997) of different forms of injustice offers a useful way of integrating insights from literatures on different forms of disadvantage. Then, she listed two types of injustice. First, she pointed to “primarily economic conceptualisations of injustice,” which includes exploitation (the appropriation of the fruits of one’s labour), marginalization (exclusion from the means of livelihood or confinement to poorly paid, undesirable forms of work) and deprivation (being denied an adequate standard of living). Second, she referred to “cultural” forms of injustice that stems from social patterns of representation, interpretation and communication (Kabeer, 2000, 84).

Figure 2 Redistribution and recognition



Source: Kabeer.2004. P.85, Figure 1.

Showing a conceptual spectrum stretching from primarily economics forms of injustice at one end to primarily cultural forms at the other end (Figure 2), Kabeer suggested that both forms of injustice “are manifested in the ways in which dominant groups invisible, seek to impose dominant values, or routinely devalue and disparage certain categories of people” (Kabeer 2000, 84). It is clear, therefore, that she considered that the importance of the concept of social exclusion lies in its reference to relational processes in which interactions between dominant groups and subordinate groups take place.

**(2) Redistribution and recognition**

What Kabeer mentioned about cultural disadvantage offers valuable insight for our studies on the Sama-Bajau in the urban center:

While cultural disadvantages primarily associated with despised identities, it is frequently accompanied by economic discrimination: such groups face greater difficulties in finding employment and a greater likelihood of losing it. (Kabeer, 2000, 85)

When injustices take hybrid forms somewhere between primarily economic and primarily cultural ends on the spectrum, what Fraser calls “bivalent collectivities,” social groups for whom economic disadvantage is deeply related to cultural disadvantage (Fraser 1997, cited in Kabeer 2000, 85).

For example, ethnicity is one of such bivalent categories, taking different forms in different contexts (Kabeer, 2000, 85). In some cases, ethnicity structures in the labor market between high-paid, high-status work and low-paid, low-status work. At the same time, ethnicity also has cultural-valuational dimensions that can lead to a problem of recognition. It is undeniable that we live in a world where people can be harassed, disrespected, and mistreated in many spheres of everyday life just because of the stereotyped derogatory image of their ethnicity, or what they are. Sometimes, such intersection of economic and social exclusion has its roots in the colonial rules that contributed to shape the structure of the local community in the past.

Since this paper deals with the adaptive beings of the Sama-Bajau as one of the least privileged ethnic groups in Davao City, who exemplify those who belong to the bivalent categories we have discussed above, I would like to base my analysis that follows this section on the analytical framework of social exclusion provided by Kabeer (2000). As she suggested, it should be noted here that as economic disadvantage and cultural disadvantage are often interrelated, the distinction between the two is heuristic rather than real. Different forms of injustice have their own distinctive logic and strategic responses. Kabeer says:

Where disadvantage is largely economic, disadvantaged groups are likely to mobilise around their *interests*, and to formulate their demands in terms of *redistribution*. Where disadvantage is largely valuational, mobilisation is more likely to be around the question of *identity*, and demands to be formulated in terms of *recognition*. Where disadvantage is hybrid, mobilisation will encompass material interests and social identity and demands for justice will straddle the politics of redistribution as well as of recognition (Kabeer, 2000, 86) .

Kabeer added, citing Fraser, since the logic of resource-based disadvantage is egalitarian and the logic of identity-based disadvantage is diversity, it could lead to potential tension (Fraser 1997, cited in Kabeer 2000, 86). That means to say, while the former demands redistribution remedies that would close the economic disparity between the advantaged and the disadvantaged, the latter requires value to be given to groups who had been formerly depreciated. Such situations could be particularly problematic and create a dilemma for bivalent collectivities because their situation demands both their right to be treated equally, and recognition, which requires respect for their specific identities (Kabeer 2000, 86).

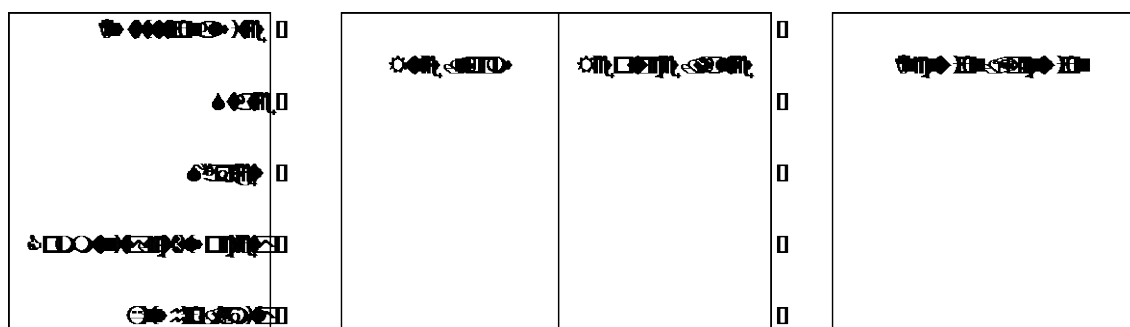
### **(3) Social exclusions and institutional rules**

It is important to consider the role that institutions play in order to analyze social exclusions. As Sen stated, “Not only do institutions contribute to our freedoms, their roles can be sensibly evaluated in the light of their contributions to our freedoms” (Sen, 2000, 33). Sen also emphasized the significance of studying the integrated perspective that the various institutions have to be understood and investigated and inclusionary functions have to be assessed. While Sen provided some descriptive analyses from cases from the experiences of East Asian countries (Sen, 2000, 33-35), he did not explicitly lay out a conceptual scheme to capture the mechanism of how the functions of institutions could lead to social exclusion.

It is Kabeer who put forward a more practical framework in order to analyze social inclusion/exclusion from the integrated perspective of institutions. She referred to North’s well cited definition of institutions as the “rules of games” (North 1990, cited in

Kabeer 2000, 87), saying that “institutions distribute resources, both symbolic and material, so that institutional rules are...about membership and access” (Kabeer, 2000, 87). Principles of membership, and the forms of access they imply distinguish between those who can enjoy the benefits of belonging, and those who cannot, and so, they are also principles of exclusion. To present such relationships schematically, Kabeer presented Figure 3.

Figure 3 Institutions, access and exclusion



Source: Kabeer. 2004. P.87, Figure 2.

It should be noted, though, that the two-dimensional scheme cannot capture the way in which distinct principles of access intersect and overlap. Access and exclusion in one institutional domain can be offset or aggravated by access and exclusion in another. Thus, Kabeer wrote:

...along with the endowments that individuals or groups start out with, the norms, entitlements and rights which prevail in a society serve to systematically differentiate their access to other resources, and hence their ability to improve on their situations in the course of their lives...The intersecting nature of different forms of exclusions and inclusions results in the segmentation of society, and in clusters of advantage and disadvantage, rather than in a simple dichotomy between inclusion and exclusion (Kabeer, 2000, 87).

Such variations include “adverse incorporation” (inclusion on adverse terms) and “hard-core” exclusion (principles of unequal access in different institutional domains reinforce each other, creating situations of fundamental disadvantage).



## 2.2 Case studies of three Sama-Bajau households

The Sama-Bajau in our sample for this study suffered not only economic distress but also other forms of exclusions in everyday life. For one thing, they were practically excluded from the public sphere. Back in 1997, when we started our research, we heard quite a few ordinary people mention, with no particular malice, that the “Bajau” were not yet treated as “citizens” in Davao City. Indeed, most of the Sama-Bajau lacked birth certificates in those days. Besides, they were not counted as registered voters except for some land-based Sama who were relatively well off.

Another exclusion occurred in the domain of religion. One of the derogatory characteristics that general populations in Davao, especially the Muslims, often attributed to the Sama-Bajau was being pagan, or people without a religion (a world religion such as Christianity and Islam). In most cases, such an unreligious portrait simply reflected the distorted image that people tended to create based on the appearance of the “poor” Bajau they would see wandering on the street. But in some cases, particularly among the Muslim Tausug who also came from the Sulu Archipelago like the Sama-Bajau, such an image still found its historical root in what scholars call the “Sulu Myth.”<sup>10</sup>

Table 1

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<sup>10</sup> According to the literature, the myth echoed the hierarchical ethnic-relationships that emerged among the Tausug (at the top), the land-based Sama (middle) and the boat-living Sama-Dilaut (bottom) during the era of maritime trade in the Sulu Zone in the late 19<sup>th</sup> century (Warren 1981; Nagatsu, 2004; Tokoro, 1999), which eventually excluded the Sama Dilaut from the practice of Islamic faith. Far from Sulu, the myth mattered little in Davao City, but many of the Sama Bajau we interviewed told us that they were not allowed to enter mosques owned by other dominant ethnic groups because of their inferior status as an ethnic group (Aoyama, 2006).

	1. Gwapo's household	2. Papa Melcito's household	3. Magsahaya's household
Group social status ranking within the community	1	3	5
Number of the households belonging to the group	6	18	27
self-identification	land-based Sama	Sama Dilaut	Sama Dilaut
livelihood			
male	shell and pearl vendor	fisherman, shell and pearl vendor	fisherman, shell and pearl vendor
female	ukay-ukay vendor, sarisari store owner, housewife	ukay-ukay vendor	ukay-ukay vendor
elders, females and children	n.a.	beggars	beggars
school education of children	up to college	none	none
languages used other than Sinama	Cebuano, Filipino/Tagalog, English, local languages used in Zamboanga City	Cebuano, local languages used in Zamboanga City	Cebuano, local languages used in Zamboanga City
participation in local politics	△	×	×
access to health institutions	○	△	×
access to informal credit market	○	△	△
access to public services			
water	○	×	×
electricity	○	△	×
access to government assistance	○	△	×
access to NGO assistance	(if necessary, ○)	×	×
membership of Christian churches within the community by 1999	×	△	×
acceptance of evangelical/Pentecostal Christianity by 2014	○	○	○

Source: Data gathered from the fieldwork conducted by the author.

Although neither the exclusion from the public sphere nor the exclusion from the established religious institutions takes an “active” form of exclusion, it cannot be denied that the Sama-Bajau in Davao City had highly limited access to both. That is to say, they faced not only economic hardship but also certain types of cultural exclusion in everyday life. In the section that follows, applying the analytical framework put forward by Kabeer (2000), we will examine the exclusion/inclusion of three Sama-Bajau households, each of which represents a different livelihood group being ranked at the

top, middle, and bottom in our earlier survey on the subjective social status within their community.

Among various institutions, we dealt with the market, local government, community/civil society, and kinship/family, which eventually played important roles in their socioeconomic life. We focused on their access to economic/material resources (redistribution) as well as management/manipulation/representation of their social identity as an ethnic group (recognition). The data used for this section include monthly household surveys that we conducted for eight months in 1999, and interviews with selective members from those households<sup>11</sup>. Some more recent updates are also to be added based on the data collected through a series of short-term fieldwork that the author conducted from 2000 to 2013. Table 1 shows socioeconomic characteristics of the three households.

### **(1) Gwapo's household from Group One**

#### **Group Profile**

As we revealed earlier in this paper, there were five subgroups of the Sama-Bajau in our research site from 1997 to 1999 with different social statuses within the community, of which Group One was ranked highest in social standing. This group was composed of six households, all related to each other. They lived in *Pikas*, separately from the rest of the Sama-Bajau in *Macao*, Isla Bella. Males of an income-producing age from this group engaged in selling pearls and shells at resort hotels, while females were homemakers and/or self-employed in non-fishing sectors. Members of this group, land-based Sama originally from Zamboanga City, adapted to life in the market society of Davao City relatively well, suffering less social exclusion: they earned a decent amount of money from their economic activities; their children went to school with a few reaching higher education; they did not hesitate to contact local politicians in their

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<sup>11</sup> Indeed, we conducted the same research on all five groups we obtained from our earlier survey on social inequality. Due to the limits of space, however, we focus on the three groups, which all experienced partial or total conversion to Christianity later.

Barangay<sup>12</sup>, other government agencies and community-based organizations if necessary; they had access to private and public health institutions. Some of them were members of Social Security System (SSS). While Sinama was still the common language, their children spoke Cebuano (lingua franca in the Visayas and Mindanao), Filipino (Tagalog) and English as well.

### **Inter-ethnic group relations in economic and political life**

Gwapo was the head of one of the households that belonged to this group. He was born in Rio Hongo, Zamboanga City, in 1961. His father was a half-breed Chinese Cebuano who was a mechanic, and his mother, “Bajau,” who used to be a sea diver, who gathered coral and shells. His household at the time of our research was a nuclear family consisting of his wife and six unmarried sons. I will describe their social relationships in economic, political and religious terms.

In the early seventies, the tension between Muslim separatists and the Philippine government heightened in Mindanao. The peace and security deteriorated in Zamboanga City. Gwapo and his mother then were forced to move from one place to another, wandering back and forth between the cities such as Olongapo, Davao, Cebu, Manila, and Zamboanga. While moving, they continued a “buy and sell” business to survive day to day. Somehow, he was able to reach first-year high school as his educational attainment. It was in 1982 that Gwapo moved to Davao City and settled in Isla Bella with his mother, and now, with his wife (half-breed Tausug land-based Sama) as well. In the last days of the President Ferdinand Marcos dictatorship in the mid-1980s, Gwapo practiced barter trade with cargo ships anchored in Santa Ana Wharf, which was in viewing distance from his house. The barter involved many commodities such as groceries, pottery, and decorations. He sold them in town and made a quite a fortune.

By the 1990s, Gwapo and his wife had started an “ukay-ukay” together. They bought the clothes from Cebuano retailers in downtown. When they had amassed a small

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<sup>12</sup> Barangay is the smallest administrative unit in the Philippines.

amount of profits from their “ukay-ukay” business, Gwapo started a pearl business. By the time of our research, he had come to deal with various kinds of accessories and decorations. Some of them were made of cultured pearls from Hong Kong. What made his business activities more stabilized and gainful than those of other Sama-Bajau pearl vendors in Isla Bella were social relationships in the wider community: 1) long-relationship with a Maranao merchant who regularly consigned Gwapo pearls to sell up to the equivalence of 10,000 pesos<sup>13</sup>; and 2) the management of a luxury hotel near the international hotel (at the time) gave him an exclusive permission to run his business at the hotel’s pier, where many tourists took the boats to Samal Island; and 3) the manipulation of his ethnic identity as “Bajau” to potential customers, who may associate it with the image of pearl divers in Sulu.

Gwapo told us that some of the Sama-Bajau in Isla Bella used to live as his neighbors until the early half of the 1980s. They were under protection of a “minority leader” named Palandawan, who was an ethnic Maranao and married to a “Bajau” woman<sup>14</sup>. This Maranao leader provided water, electricity, and security to the Sama-Bajau households before 1984. For these services, he collected cash or payment in kind from each household. In those days, he was the owner of the only “sari-sari”<sup>15</sup> in the area where the Sama-Bajau obtained their daily necessities on credit. He also allowed them to watch television shows through his window for a fee. Most of the Sama-Bajau then did not own TV sets. The situation changed, however; giant waves hit the coastal area and caused tremendous damage. Palandawan decided to move to the other side of Isla Bella, taking his fellow Sama-Bajau households. Gwapo’s group did not follow this Maranao leader’s decision because they did not want to be controlled by him anymore. Since then, they had little contact with Palandawan. At the time of our research, they had no particular relationship with the Barangay Captain (Maranao) and Barangay Councils (mostly Maranao). They told us, though, that they could try to approach local politicians, government agencies and NGOs when they needed assistance such as scholarships for their children as the “genuine Bajau” (poor ethnic minority).

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<sup>13</sup>As of November 1999, USD1 was equivalent to approximately 40 pesos. The legitimate minimum wage in non-agriculture sector in Davao City was 158 pesos.

<sup>14</sup> We found later that she was an ethnic Sama Bangigi with Islamic faith.

<sup>15</sup> “Sarisari” is a convenience store found in the Philippines.

## **Religious life**

In this group, each household showed relatively strong economic autonomy, but it did not mean that Gwapo's household and the rest of the members in this group lost close relations with each other and became independent entities with little mutual social obligation; they still engaged in religious rites and social events collectively.

Social gatherings centered around Gwapo's aunt, who was a "panday" (traditional midwife) and "djin" (spiritual medium) as well. During our first fieldwork, Tisoy's household participated in many religious rites and social events, both small-scale (within the household) and large-scale (involving the entire group and beyond). For the latter, elderly male members led the prayers. Often it was one of Tisoy's in-laws, who was also a "djin." When his capacity as a "djin" was not enough to perform requested rites, the "imam," Muslim Laminusa or Muslim Kabigaan, was invited. The imam would be also called for significant rites of passage events such as male circumcision, marriage, and death.

Leaders and places were indispensable for them to perform social and religious events. Just as important for them, however, was the capacity to finance these gatherings. This group performed best in terms of earning capacity among the five groups within the research site, but the timing of such events also depended on the availability of disposable cash. Later on in the 2010s, those elder members who led such events died. By that time, Gwapo's wife had been working in the Middle East as an Overseas Filipino Worker (OFW), specifically as a "Muslim" domestic helper. To our surprise, though, some of the remaining relatives in this group embraced evangelical Christianity, and there stood a small church built by missionaries from the West within their compound when we visited them in 2013<sup>16</sup>.

## **(2) Papa Mercito's household from Group Three**

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<sup>16</sup> We have yet to interview them to learn the detailed process of this rather sudden conversion, which apparently happened without much to do with the acceptance of Pentecostal/Southern Baptist Christianity by the Sama-Bajau on the other side of Isla Bella since the early 2000s.

### **Group Profile**

Group Three was ranked the third in social standing within the community. They identified eighteen households as their group. Those households consisted mostly of relatives who lived physically close to one another in the same corner of the Sama-Bajau inhabited area in Isla Bella. Males of an income-producing age peddled pearls and shells in downtown streets, and to crews of local and foreign cargo boats; while females were homemakers and/or peddled “ukayukay.” Members of this group identified themselves as Sama Dilaut with their own experience of living in a houseboat or with memories of their parents and/or relatives doing so in the past. They were originally from Zamboanga City, and many of them use to live in a particular village called Talucsangay. Compared to those who belong to Group One (land-based Sama), members of this group were less adapted to urban life in Davao City, experiencing social exclusion at a higher degree. They lived an ordinary life, relative to the Sama-Bajau standards within the community, but it only meant that their economic standard of living was much lower than that of their non-Bajau neighbors in Isla Bella. Some of their children went to school, but many of them dropped out at an early stage in elementary school. Except for those who were members of a Christian church, they had difficulties approaching Barangay, other government agencies and NGOs when they needed assistance. Likewise, they had access to public health institutions, but they often had difficulties utilizing services available for them mainly because many of them lacked sufficient command of the Cebuano language.

### **Inter-ethnic group relations in economic and political life**

Papa Melcito was the head of one of the households comprising this group (we will call him Papa for short hereafter), a male presumably around 60 years old at the time of our first research. He and his wife lived with the family of their fourth daughter who had a husband and six children.

Papa did not know where his parents came from. As far as he could recall, they were Sama Palau, or the Sama living in boats. He was born and raised in a houseboat. He abandoned living in the boat sometime between the late 1940s and the early 1950s because it became dangerous to live at sea due to what he called “pirate,” or pirates,

who would attack the Sama Dilaut with “new weapons” (meaning fire arms). His family and relatives set for Taluksangay in Zamboanga City. They started living in stilt-houses there. By the end of the 1960s, the peace and order became much worse in Zamboanga City. More attacks on the “Bajau” by Tausug “pirates” in the adjacent waters occurred. Soon, Papa and his family fled Zamboanga City along with other Sama-Bajau neighbors. Drifting from one place to another, they found a piece of “empty land” (actually a sandbar off the shore) along the coast of Davao City, known as Isla Bella today. As he recalled, it was after the declaration of martial law (in 1972) by President Marcos. Papa and his family counted as one of the pioneer migrants who arrived in Isla Bella. In the early 1980s, he peddled shells and pearls, following other Sama-Bajau peddlers, but he proved to be a poor businessman mainly due to his inability of communicating effectively other than in the Sinama language.

When we met Papa in 1997, he had quit the selling business and had become an almost “full-time” mendicant. Papa regularly made short trips with his wife to other cities in Mindanao in order to beg, and they brought home some amount of cash and gifts (mostly clothes) they bought for their grandchildren. In this household, the only male member of an income-producing age was Papa’s son-in-law. He had practically quit spear fishing by 1999 and started a shell and pearl peddling business, but his operations were sporadic because of the lack of finance. His wife (Papa’s daughter) occasionally went begging in the public market, where she would ask for small change. Sometimes she also received food such as fruits, vegetables and fish. Later she started an “ukay-ukay,” peddling in the public market for two hours every early morning. Even though the amount she earned from such operations seemed small, it contributed to the upkeep of the entire household. However, she quit the entire operations in December 1999, explaining that she found it hard to breastfeed her baby while working outside and the baby fell sick. We also observed, though, that her capital for business was exhausted, too. Papa and other adult members of this household did not allow their small children to go begging, but they did not go to school, either. During the Christmas season, however, the children were allowed to operate what was called “mamasko,” or caroling, outside the community in order to earn a small amount of cash.



The monthly average cash income of Papa's household during our observation in 1999 was 2,306.3 pesos. Income per head per month was 205.0 pesos, about one fourth of that of Group Two (land-based Sama) and surprisingly about one tenth of that of Gwapo's household (Group One). How could they survive with this extremely low level of cash income in the city? Papa's household activities were extensively supported by assistance both in cash and in kind from relatives who had accepted Christianity and who were living relatively decent lives. Papa's household members were also allowed to purchase cassava (their staple), and other needs on credit from nearby "sarisari" stores owned by a Tausug. Without such social relations, Papa and his household members could not meet their daily needs. This is not only because of the age and incapacities of Papa and his wife; this was more due to their lack of direct access to resources now available around the Christian church with Sama Dilaut pastors, where more missionaries from outside had started to come and donate the community cash, food, medication, education, information, etc. in the end of the 20<sup>th</sup> century. We also observed when Papa's household faced unusual increases in expenditures, like medical expenses beyond their normal needs, they pawned cashable assets (typically, metal watches and gold jewelry) downtown, but the value of the individual articles they pawned was always small, never exceeding 500 pesos.

### **Religious life**

Although Christianity made inroads into this particular group, Papa was still called the "chief of the Bajau" by his fellow Sama-Bajau in Isla Bella and treated so with much respect as well. As a "djinn," he used to take care of sick members of his group: he saw patients, diagnosed possible causes of their illnesses, and if necessary, he performed curing rites for the patient. By the time of our research, however, he had stopped offering his "traditional medicine" to those who had accepted Christian faith, such as Christian converts who preferred to attend the prayer and healing meetings of the church. The church also helped them visit hospitals downtown. Papa still conducted wedding ceremonies for the members of this group, but his leadership was evidently waning and becoming more symbolic. He used to talk to Muslim Maranao leaders on behalf of the Sama-Bajau in the area, but now he no longer attempted to deal with the local government for any policies favorable for his group. As a Sama Dilaut pastor

emerged as a new leader in this group, the member of the church steadily increased in 1999.

Later on in 2001, Papa himself started going to church rather earnestly. Then he died of illness in 2003 as a Christian “Bajau.” It was the Sama Dilaut senior pastor of the church who conducted the funeral rite for Papa. By 2004, missionaries from California, in the United States, came over to help with the Sama Dilaut pastor and his church by providing resources and information. Then their church kept expanding to include many more Sama-Bajau residents in the area who decided to join. Soon, some of male members broke away from the church and put up their own with assistance from other missionaries from the United States and South Korea. With their help, more children started going to school (at least at the elementary level), having a new and more respectable identity as “Christian Bajau” (they had become a people with a religion), while the economic activities that the Sama-Bajau participated in Davao City did not change much, and still hasn’t as recently as today. It can be said that they have secured a place to live in the city, but their political empowerment is yet to be seen.

### **(3) Magsahaya’s household from Group Five:**

#### **Profile**

Group Five was ranked at the bottom in social standing within the community. The group consisted of twenty-seven households as its members. Those households were mostly related, and they lived close to one another. Though males of an income-producing age often claimed to be spear fishermen, many of them appeared to be unemployed or underemployed, having difficulties in the shift from fishing to non-fishing activities in the urban economy. Females, elders, and children often begged on the street, while some of the females also tried to do “ukay-ukay” business if not very successfully. Members of this group identified themselves as Sama Dilaut, like Group Three. Many of them came originally from a particular village called Sangali, Zamboanga City. Out of the five groups within the community, members of this group least adapted to the life in the urban center of Davao, undergoing many forms of social exclusions: with limited resources, they tended to present themselves as “poverty-stricken Bajau (and therefore it is worth giving something to us)” to

non-Sama-Bajau populations for survival. Very few of their children attended school. They had no direct access to Barangay, other government agencies, and NGOs. They had very limited access to public health institutions due to financial matters and communication barriers. Very few were fluent in languages other than their own.

### **Inter-ethnic group relations in economic and political life**

Magsahaya was the head of one of the households composing this group, a female presumably around forty-five years old when we started our research. At the time, she lived with her second husband, two unmarried children, a son-in-law (husband of her deceased daughter), his four children and two sisters of her own (both widows). However, the size and form of the household often changed when some of its members traveled for a rather long period and the members left behind were temporarily absorbed by the household of her son who lived next door.

Magsahaya did not know where her parents came from. She only remembered that they lived in a houseboat without having a house on land. As Sama Dilaut in those days, she also spent her childhood in the boat with her parents. They moored mainly in Sangali, Zamboanga City. When she married her first husband, though, they abandoned the houseboat and started living in stilt-houses because it became more dangerous to live at sea as “pirates” (mostly Muslim Tausug) attacked them. By the first half of the 1980s, they moved to Margosatubig in Zamboanga del Sur, looking for a safer place to live. After her first husband died, her sons became independent fishermen with their own boats to operate spear fishing and long-line fishing. A Tausug middleman, who was also a “haji,” provided them with capital for their fishing operations. When this Tausug “haji” died, though, they were forced to give up fishing because there was nobody else to provide them with necessary finances. Hard up, they moved first to Tibanban in Davao Oriental, and then to Isla Bella in Davao City in the 1990s where many of her relatives and neighbors from Sangali had settled. But they could not find non-Sama-Bajau middlemen or fish buyers who could offer them “paon” (literally meaning bait, but in this case it is used as a metaphor for the provision of operating capital). While male members struggled to shift to non-fishing economic activities such as the shell and pearl business, females, elders and children found Davao City a suitable

place for begging because of its large size of “pitying” Christian populations (including middle and upper income classes) and its abundance of food in public markets.

What was characteristic of Magsahaya’s household (and of many of the other ones in this group) is that they were still highly mobile: they would leave Isla Bella to visit other cities, mostly within Mindanao, in order to visit their family and relatives, to peddle dry goods, and/or to go begging. Their sojourns lasted usually for one to two weeks, but sometimes more than one month. In the case of Magsahaya’s household, everybody was mobile, but they never moved together. Once some of them left home, they would be temporarily detached to form an independent sub-household while away: they seldom sent anything back home; and it was also rare for them to contribute anything in cash or in kind when they returned home. The main bread earner was not identifiable in this household because everybody worked and none of them earned enough to support the entire household. In other words, everybody worked hard to feed his or her mouth at least and also small children in the household. The monthly average cash income of Magsayaha’s household during our observation was 2,683.8 pesos. Income per head per month was 243.9 pesos, slightly higher than Papa’s household in Group Three, but it should be stressed here that unlike Papa’s, Magsahaya’s household lacked safety nets provided by its relatives to meet their necessities because the members of this group were almost equally poor with little surplus.

Magsahaya’s household members were allowed to purchase cassava on credit from a “sarisari” owned by a Tausug. They were also able to borrow a small amount of cash by pawning “habul” (blankets) and “malong” (a cylindrical cloth used for multiple purposes) at the same store. When they faced a rather large amount of expenditures beyond their capacity, typically for medical expenses or starting up a non-fishing business, they would resort to Cebuano pawnshops, but by the end of our research, there was very little left for them to pawn. Some younger male members of this group, including Magsahay’s eldest son, were seen trying out the shell and pearl business. They had to purchase a small amount of pearls in cash from a Maranao merchant downtown, not being allowed to become his consignees. In general, this group had the most limited contacts with outsiders such as local government agencies, NGOs and missionaries.

Sometimes Magsahaya complained to us that other groups of the Sama-Bajau in Isla Bella received assistance from the government but they received none. However, she never attempted to approach any of the government agencies by herself; it seemed to us that she would rather wait for some people of goodwill to come find them and offer them assistance.

### **Religious life**

Degradation and loss of religious rites could be also seen in the group. Magasahaya told us that they used to perform collectively religious rites and social events, which would be completed with communal meals. But we had very few opportunities to observe such rites and events during our fieldwork. There were still some “djin” and “panday” in this group. Although they individually played their roles as such within their own households and those of their close relatives, we seldom saw them lead collective social events beyond the individual household. As one of such rare opportunities, the group decided to celebrate “pag-hinan ni Tuhan” to strengthen the spiritual power of an elderly female, who was considered as both “djin” and “panday” among them. She was one of Magsahaya’s maternal aunts. Each household contributed some to the celebration according to its own financial status. Magasahaya’s household, though, was exempted from the payment because of its extreme economic distress.

This group had relatively more contacts with Group Three where Papa Melcito’s household belonged, for both groups were Sama Dilaut from Zamboanga City, and actually, some of them intermarried between the groups. Notwithstanding, there was a small but growing distance, both materially and psychologically, between those two groups. As Christianity steadily made inroads into Group Three, the norms and values seemed to start changing, particularly among those who had been converted. For example, more than once, we heard from Magasahaya and members of her household that they were told not to beg by female Christian converts from Group Three when they encountered those women on the street. Magsahaya’s husband furiously said to us that he felt really insulted when they shouted at him, “It’s such a shame to see a “Bajau” begging! Stop begging!” Despite such hard feelings, though, it was also true that this group still had relatively close feelings and relations to Group Three. Indeed, they had

started to resort to the Christian Church in Group Three when they suffered severe illness and other misfortunes beyond their own capacities, especially when they were unable to visit health institutions, or they could not afford medical expenses even though they managed to visit one by themselves. Consequently, the church with Sama Dilaut pastors had been growing familiar to Magsahaya and other members of this group.

Later on, by the early 2000s, most of the households in this group, including Magsahaya's, eventually joined the church as its followers, and by 2014, they broke off from the church and established a new one of their own, a small-scale tough one, with their own religious leaders. So long as we know, however, their socioeconomic situations have not been improved much yet, though a number of children who were enrolled in local elementary schools appeared to increase with assistance from the missionaries and local government agencies.

### **3 Comparing the experience of the Sama-Bajau migrants in the Philippines with that of the Sama Dilaut and that of the Orang Asli in Malaysia**

#### **3.1 A Case of the Sama Dilaut experiencing official Islam in Sabah, Malaysia**

Lastly, I would like to compare the case presented in this paper to the case of "Sama Dilaut experience with official Islam in Sabah, Malaysia" studied by Nagatsu Kazufumi (Nagatsu 2004). From the perspective of poverty studies, one of the most striking facts that separate Nagatsu's case from the case presented in this paper is that embracing official Islam offered a vehicle for the Sama Dilaut not only to improve their social status in the wider community but also to become more integrated into the public sphere in Sabah, and Malaysia as well, as part of the "majority" Malays and "legitimate Muslims," without losing their own ethnic identity, through participating in education and public administration. In other words, they seemingly achieved an ideal incorporation into the nation-state despite their past characteristic of being a "bivalent collectivity."<sup>17</sup> As we will see, their socioeconomic and political disadvantage was

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<sup>17</sup> As to the definition of the term, see the previous section 2.1 of this paper.

deeply related to cultural disadvantage in the past.

Nagatsu pointed out that the Sama Dilaut's religious experiences and the related changes in their social status in contemporary history in Malaysia are different from those in the Philippines, across the borders. As the Sama Dilaut who inhabited Sulu Archipelago and its neighboring areas, both began to embrace Islam in the 1940s to 1950s. However, the Sama Dilaut in Sulu (Philippines) continued to be considered as "illegitimate" Muslim groups by their neighboring dominant ethnic groups, especially the Tausug, who justified their discrimination against the Sama Dilaut through a local myth that they were an inferior group who were once cursed by Allah. On the other hand, the Sama Dilaut in Semporna (Malaysia) became gradually recognized as Muslim, and nowadays they are widely accepted as members of the local Muslim society. Nagatsu attributed this phenomena to basically three factors: 1) the establishment of national boundaries, which separated Semporna from Sulu, and integrated it into the territory of Malaysia; 2) the "officialization" of Islam in Malaysia reaching Semporna, Sabah, where Sama populations were demographically the majority; and 3) the Sama Dilaut's positive agency to seek approval from religious institutions as part of their strategy to secure a position in the local society.

### **3.2 A Case of the Orang Asli experiencing school education in Negeri Sembilan, Malaysia**

Although the contradictory sociopolitical and economic consequences that embracing a monotheistic religion brought to the Sama Dilaut in Semporna and the Sama-Bajau in Davao City should not be attributed *solely* and *simply* to the difference in the institutional framework at the national level, it is still worth discussing the interactions between the state development policy and "minorities." It should be noted here again, though, that the Sinama-speaking populations in Semporna became the "majority" in numbers in the local context, once separated from Sulu and integrated into Malaysia, while those in Davao City apparently still remained as a kind of marginalized "minority," which describes:

Outside this category [coalition-worthy indigenous minorities] fall those groups

which, because they are small in numbers, geographically remote from the centre, marginal to the national economy, and lacking in western education, are insignificant to any conceivable majority. Typically, they have played no role in colonial nationalist politics (Anderson 1998, 329).

In this sense, I would also like to look at a case study from the experience of the Orang Asli, the indigenous people of Peninsular Malaysia, with school education as a metaphor of development led by the state.

Japanese anthropologist Toshihiro Nobuta conducted his long-term fieldwork in an Orang Asli community in the province of Negeri Sembilan, Malaysia from 1996 to 1998 (Nobuta 2010). The Orang Asli always remained marginalized throughout the history of Malaysia as well as in the contemporary Malay society. They responded to exterior forces including the state power (e.g. political and economic controls, inclusion, assimilation, national integration, development projects, Islamization, and so on) by various means such as subordination, acceptance, escape and resistance (Nobuta 2004, cited in Nobuta 2010)<sup>18</sup>. According to Nobuta's study, the Orang Asli in his research site refused and resisted the conversion to Islam but accepted school education, which seemed rather contradictory to the scholars who considered both Islamization and school education as political measures to integrate and assimilate the Orang Asli into the nation-state where the Malay (using the Malay language and practicing Islamic faith as a state religion) constitute the mainstream of the society. In this case, however, not every child went to school; there had been economic disparity among the villagers since the introduction of government development projects (aquaculture, plantation rubber, etc.) in the 1970s; and, in the late 1990s, those who belonged to the upper social strata within the community tended to benefit more from school education and started securing more decent jobs such as government employees outside their community, while those who belong to the lower social strata tended to drop out early, or refuse to go to school in the first place, and therefore, remained working within their community with little choice to change their lifestyle. In sum, school education contributed to widen

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<sup>18</sup> In recent years, the Orang Asli have come to developed indigenous people's movement, strategically using their identity as the marginalized (Nobuta, 2010, 354).



the existing economic disparity among the villagers. Nobuta also pointed out, however, that those who were educated in school adapted effectively to the wider Malaysian society, creating a new identity as Orang Asli instead of losing their ethnic identity.

### **3.3 Development policies for the margins: Malaysia and the Philippines**

Although there is a difference between the Sama Dilaut in Sabah who achieved upward social mobility rather as an ethnic group through embracing the official Islamization, and the Orang Asli in Negeri Sembilan who showed individual variations in adaptation to school education and concomitantly to the wider community, both experiences happened within the border of the same nation-state, Malaysia. Malaysia introduced its national development plan, New Economic Policy (NEP), in 1971, which presented two main goals, 1) eradication of poverty *regardless of ethnicity*; and 2) restructuring of Malaysian society (Torii, 2010, 109). The NEP was adopted for a period of twenty years, but it was only after 1985 when the Fifth Malaysian Development Plan was formulated under Prime Minister Mahathir that Sabah, together with Sarawak, became part of the national development plan mainly in relation to its goal of poverty eradication (Torii, 2010, 126). The Orang Asli, who were considered as a “minority” among the “*bhumi putra*” (the Malay race and other indigenous peoples in Malaysia), were referred to in the NEP in the context of poverty eradication in order to integrate them into the “mainstream” of the Malaysian society through the introduction of settled lifestyles, cash economy, and later, modern health facilities and educational systems as well (Torii, 2010, 123-124). On the whole, ethnic minorities other than the alien ones such as Chinese have played a more important role in politics in Malaysia to form a Malay ethnic majority (Anderson 1998, 325-326).

In contrast to Malaysia, ethnicity plays such a minor role in the Philippines where Catholic colonialism produced a huge majority of Christians and colonial rules generated a powerful Chinese mestizo latifundist upper class, intermarried across ethnolinguistic lines with common interests in dominating the politics and economy of the country (Anderson, 1998, 328). Now let’s turn to the country’s development plan. Unlike the case of Malaysia, the Philippine government’s development policies historically lacked coherence and implementation. According to Tamaki’s reflections

(Tamaki, 2010), the private sector, rather than the government, played the more significant role in development projects. The government's policies for ethnic cultural minorities, or indigenous peoples, dramatically shifted its principle to the protection of their rights after the President Aquino administration (ILO 1993; Eder and McKenna 2004; Tamaki 2010). But the Indigenous Peoples' Rights Act 1997 (IPRA, Republic Act No.8371), primarily oriented to the rights for ancestral domains, was not meant to offer measures to uplift the well-beings of the ethnic cultural minorities, such as the Sama Dilaut, a maritime people with no definite ancestral domain, especially those who are forced to survive in the urban centers. Besides, its central government often does not intervene directly in local politics, especially in those in the "boarder-space" (Nagatsu, 2010, 26) remote from the capital, where local politicians and other social forces are deemed more powerful even before the decentralization was officially institutionalized in the 1990s (Abinales 2011).

### **3.4 Discussions**

As they embraced Evangelical/Pentecostal Christianity, the Sama Dilaut in Davao City increasingly accessed the influence of missionaries from other countries, or the West, who were not directly involved in local politics but were considered to be as "symbolically" powerful as, or even more powerful than, the local politicians and other leaders. Their intensions had something in common with the Sama Dilaut in the Semporna's case in terms that both took advantage of the authority of the "outsider," whether it was the national government or evangelical missionaries from the United States, in order to seek a better social status in the local society where they had been marginalized. Besides, it should be also noted that it did not cost the Sama Dilaut much to accept Evangelical/Pentecostal Christianity because of its congregational organization that could be established with a simple house church and a self-made religious entrepreneur from within their own community<sup>19</sup>.

However, one of the factors that critically separates the two cases is the institutional framework: In Semporna, the religious experience of the Sama Dilaut developed in the

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<sup>19</sup> For more details about the common characteristics of Global Charismatic/Pentecostal Christianity, see Hefner ed. (2013).

process of the “officialization” of Islam in and by the nation-state; in Davao, the Sama Dilaut’s religious transformation also happened within the geographical territory of the nation-state, but it occurred in a secular nation where the government is not in a position to intervene in religious affairs. Their acceptance of Christianity took place under layers of intensions of different *private* actors in the landscape of Davao City, one of the rapid growing Asian cities in the contemporary globalized world. Consequently, their new identity of “Christian Bajau” did not directly lead the Sama Bajau to participate in any religious affairs, let alone political ones, outside their community at least during the early 2000s. It should be noted, though, that unlike the case of the Orang Asli in Malaysia that we have seen in the previous section, most of the Sama-Bajau children in Davao City would not have had an educational opportunity if they were not assisted by the missionaries, who attempted to teach their followers the value of education together with religious faith, and eventually to provide the resources and information the Sama-Bajau needed to send their children to, aside from their own Bible schools, local schools.

## **Conclusions**

Despite the fact that the Sama-Bajau migrants had physically settled in Davao City, where ethnic and cultural diversities are officially treated as resources for tourism, most of them appeared to be excluded from the public spheres. Moreover, they were facing a derogatory and monotonous image that other dominant ethnic groups, whether with malice or not, cast on them as a “poor” ethnic minority who kept wandering on the street and had no religion. This paper has tried to shake this paradoxical picture by highlighting what kind of living space the Sama-Bajau had created against existing social exclusions.

Based on the data the author had collected in the late 1990s, it was revealed that although most of the Sama-Bajau migrants were more socioeconomically disadvantaged than their neighbors of other dominant ethnic groups, there were also variations in adaptation among them to the urban market society. To explain such variations, the analytical framework of social exclusion was applied to the case studies of three

households, each of which represented a different social standing within the community (the top, middle and bottom). Those case studies attempted to explain the different interactions between the three households and the institutional rules in order to secure material redistribution and recognition of their social identities. The updates from the recent fieldwork, though, all of the three households (and the groups they belonged to) have separately accepted evangelical/Pentecostal Christianity. The new religious identity and resources that the outsiders, typically missionaries from the West, had brought in helped them secure living spaces in the urban center, but so far it has not necessarily helped them improve their socioeconomic status in the wider community. Finally, we compared the present study to a case of the Sama Dilaut's experience with the "official" Islamization in Sabah and a case of the Orang Asli's experience with school education in Negeri Sembilan, both in Malaysia, where they, if not all, obtained opportunities to achieve upward social mobility and integrated into the wider Malay society without losing their ethnic identities. It has been argued that the difference in the institutional framework at the national level between the Philippines and Malaysia could be one of the factors contributing to the contrasting situations of the Sama-Bajau in the two regions.

One of the implications that could be delivered from such a possibility is that the predicament of the Sama-Bajau in Davao City in part may echo the institutional bias that the Philippines as a nation-state has had as part of its political structure. Investigating the nature and causes of the persistent poverty and inequality in the country, Balisacan pointed out that "growth elasticity" of poverty reduction, or a 1 percent increase in the income growth rate increases the poverty reduction rate, is 1.3 to 1.65, noticeably low (Balisacan and Fuwa 2004, cited in Balisacan 2007, 208) compared with 2.5 for 47 developing countries obtained by Ravellion (2001, cited in Balisacan 2007, 209). Caballero-Anthony added, "Absent strong institutions, the state would be unable to correct the political system that has been embedded in clientelism," and, therefore, "the alienation of the masses and the failure to empower the marginalized" happen (Caballero-Anthony 2007, 6-7). This is even more noticeable in the distribution of public services that the state has been traditionally responsible for.

(The crisis in the Philippines is) manifested.....in a deepening frustration over the inability of the democratic institutions to deliver the goods of a public character. (Hence, to the ordinary citizens who derive few such benefits, the government) is an abstraction, an alienated entity, whose only palpable dimension is the episodic patronage dispensed by bosses and politicians, which merely reinforces the poor's real condition of dependence." (Hutchcroft and Rocamora, 2003, 260, cited in Caballero-Anthony 2007, 12).

In relation to the first implication, the second one that could be delivered from the present study is, rather a question of who should/could be responsible for social policy in the Philippines to mitigate the social exclusions that the poor ethnic minorities like the Sama-Bajau in our paper suffer. In the analytical framework by Kabeer, it is traditionally with the state that such responsibility rests, and the "state remains the only institution with the capacity to side-step disempowering market and customary relations" (Barbara Harris-White 1995, cited in Kabeer 2004, 94).

However, it is well known that the state often fails to address the problem of poverty, exclusion, and injustice, and indeed in some cases it actively serves to reinforce them (Kabeer 2004; Caballero-Anthony 2007). Typically, "unruly practice" (Fraser, 1989, Gore 1993 cited in Kabeer 2004, 92), which refers to the gap between rules and their implementation which occur in practice in many institutional domains can be frequently seen in the public sector of the Philippines. If the state has been proved to be not well functioned to deliver public services, then what agencies could shoulder them? Caballero-Anthony sees hopes in the country's civil society, saying "Many would agree that civil society organizations (CSOs) have provided intervention in the absence of adequate public services (Caballero-Anthony 2007, 14).

There is no doubt that NGOs have been playing an important role in the history of the development in the Philippines (Clarke 1998; Goda ed. 2009). Nonetheless, it is also known in the literature of development studies that there are aid projects that NGOs and other agencies deliver but result in rather unexpected outcomes (Kwiatkowski 1999; Hilhorst 2003; Gibson et. al 2005; Mosse 2005).

Indeed, a local Development NGO came to our research site and tried to help the Sama-Bajau, especially the poorest households, uplift their plight by implementing a multi-faceted, “participatory” community development project with funds from Canadian International Development Agency (CIDA) and Japan International Cooperation Agency (JICA) in the mid-2000s. The project provided them with some resources, social services (health and education), and credit for livelihood, and built more walks in the community, and it looked good at first. However, the improvement in the standard of living did not last once the project ended and the NGO left the site, though the NGO had tried to organize the community during the duration of the project (Aoyama 2010a).

After the NGO and its donors from the North left our research site, what still stood there were churches. In fact, the number of evangelical/Pentecostal churches with Sama-Bajau congregations in Isla Bella has increased since the mid-2000s. When a fire burnt down the entire Sama-Bajau community in Isla Bella in 2014, there were at least six churches immediately being rebuilt, each of which was led by a different Sama-Bajau senior pastor from their own community and supported by different groups of missionaries from the United States and/or South Korea. Some of them have been more politically empowered by establishing connections with the local government agencies, whether at the Barangay level or city level, or at both, with the assistance of those foreign missionaries, especially those from the United States, while others have not (Aoyama, 2014b).

Literature on the Global Pentecostalism indicates the impact of the conversion on the economic well-being and political empowerment of the converts varies from place to place (Anderson et al. eds. 2010; Hefner ed. 2013). It is premature to discuss the medium- and long-term impact of their acceptance of Christianity on social life at this time. Therefore, the remaining issue for the author is to examine the lived experience of the Sama-Bajau converts, both subjectively and objectively, in order to reveal the meaning of accepting evangelical/Pentecostal Christianity in the contemporary landscape of Davao City, Mindanao, the Philippines, from their own perspectives. This

is not only intended to hear their voices but also to understand more deeply the nature of the living space(s) that the Sama-Bajau have been struggling to create against the layers of social exclusion. To make it possible, we need to embed those voices in the wider context and reexamine the relational processes in which the Sama-Bajau and other ethnic populations interact within the given institutional framework to negotiate living space and social identities with one another. Put another way, our question should be what makes the Sama-Bajau be what they are, say what they say, and do what they do.

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