



## **An Empirical Analysis of Political Dynasties in the 15<sup>th</sup> Philippine Congress**

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# **An Empirical Analysis of Political Dynasties in the 15<sup>th</sup> Philippine Congress**

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## **Abstract**

This paper develops metrics to analyze the extent to which political dynasties in the 15<sup>th</sup> Congress of the Republic of the Philippines are linked to different social and economic outcomes in the country. Such a detailed empirical mapping and analysis of political dynasties is the first of its kind from the country. Results show that representatives from political dynasties account for 70 percent of the jurisdiction-based legislators in Congress. On average, they possess higher net worth and win in elections by larger margins of victory compared to non-dynastic representatives. Dynastic jurisdictions are also associated with lower standards of living (as measured by average income) and lower human development (as measured by the Human Development Index), and higher levels of deprivation (as measured by poverty incidence, poverty gap, and poverty severity). Results on the correlates of dynastic prevalence and inequality are less conclusive.

JEL: D70; J45; N41; N42

Key words: democracy; political dynasty; inclusive growth; political equality; social inequality

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## 1. INTRODUCTION

Political democracies are important because they facilitate and sustain broader and more inclusive processes of economic and human development. The capacity of political democracies to engender inclusive growth makes its discussion crucial to the formulation of effective development policy agendas. Scholars associate political democracy with more predictable long-run economic growth, enhanced macroeconomic stability, more rational management of economic and political shocks and crises, and improved distributional outcomes (Acemoglu and Robinson, 2006; Rodrik, 2007).

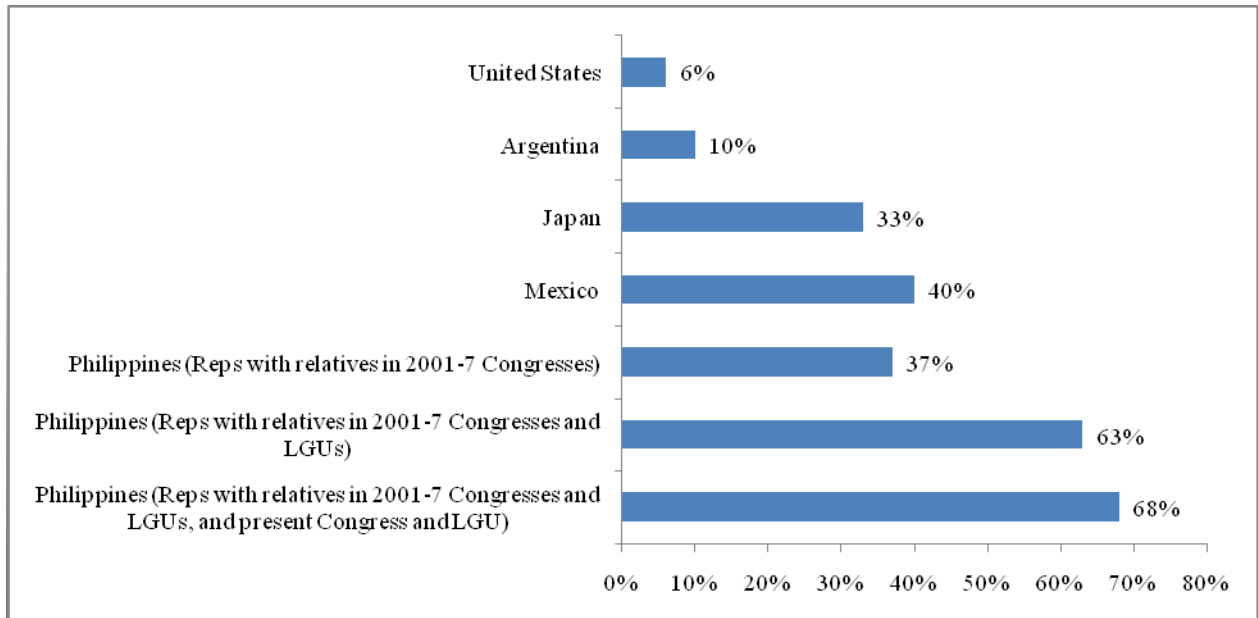
In theory, political democracies guarantee equal voice in government decision-making through a range of mechanisms like one-person-one-vote, equality in political participation, and free speech. A political democracy has the potential to cultivate an environment that is responsive to the needs of its citizens that, often, brings about higher levels of human capital investments and more inclusive and equitable social and economic outcomes. However, underdeveloped democratic institutions could be associated with weak political participation and thus produce, in some cases, political dynasties.

In varying degrees, political dynasties can exist in any democracy regardless of its structure<sup>1</sup>. A brief survey of the literature suggests that the share of legislators with dynastic links to past parliaments range from 6 percent in the United States to as high as 37 to 40 percent in the Philippines and Mexico. In the case of the Philippines – and if we consider links to local government units -- the figure reaches 70 percent (Figure 1).

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<sup>1</sup> Numerous politicians have since taken over the reins of power from their fathers, husbands, or brothers. A brief list includes: President Cristina Fernandez (wife of former President Nestor Kirchner) in Argentina, Prime Minister Yingluck Shinawatra (sister of former Prime Minister Thaksin Shinawatra) in Thailand, former President (now Congresswoman) Gloria Macapagal Arroyo (daughter of former President Diosdado Macapagal) in the Philippines, former President George W. Bush (son of former President George H. W. Bush) in the United States, Prime Minister Lee Hsien Loong (son of former Prime Minister Lee Kwan Yew) in Singapore, Prime Minister Najib Razak (son for former Prime Minister Abdul Razak) in Malaysia. Additional examples include: India's Jawaharlal Nehru, daughter Indira Gandhi, her son Rajiv and daughter-in-law Sonia; Sri Lanka's Solomon and wife Sirimavo Bandaranaike and daughter Chandrika Kumaratunga; Bangladesh's Mujibur Rahman and daughter Sheikh Hasina, as well as Ziaur Rahman and wife Khaleda Zia; Pakistan's Zulfikar Bhutto, daughter Benazir and her husband Asif Ali Zardari.

**Figure 1. Share of Dynastic Politicians in Selected Parliaments and Congresses**



Sources: United States (Dal Bo et al. 2009); Argentina (Rossi, 2009); Japan and Mexico (Asako et al. 2010); Philippines (calculations of the authors).

There is a view that the prevalence of political dynasties signals the deterioration of political competition and equality and consequently, the deterioration of socioeconomic outcomes by: a) preventing people from effectively communicating their needs to their government; b) allowing dynastic officials to use the powers of the state for self-serving interests without fear of replacement or administrative sanctions, and c) skewing the selection of political leaders favoring those with influence, possibly preventing the best and the brightest from serving in the government, and/or biasing policies in favor of certain groups. On the other hand, there is also a view that political dynasties afford reformists extended time horizons that enable the planning and implementation of policies with long-term goals. Politicians with shorter tenures often yield to populist demands and shun difficult but necessary reforms that pay-off in the future but critical to sustained, robust, and inclusive growth.<sup>2</sup> It is also possible that dynastic politicians may possess legacy-related motivations that are strongly linked with the overall outcomes in their respective jurisdictions. Thus, the longer their tenure the more they tend to care about long term outcomes. Alternatively, rent-seeking dynastic politicians, upon recognizing the pecuniary benefits of adopting growth-

<sup>2</sup> See Acemoglu and Robinson (2006) and Rodrik (2007).

oriented policies and strategies, might also be motivated towards enacting reforms that would result in considerable and sustainable economic growth in their own jurisdictions. In this regard, the net impact of political dynasties on social and economic outcomes remains an empirical question. This paper develops metrics to analyze the extent to which political dynasties might be linked to different social and economic outcomes, with the Philippines as a case study. This study presents the first comprehensive data gathering effort to map the landscape of political dynasties in the country.<sup>3</sup> The study itself draws on the extant literature in developing its metrics and expands the definition of a dynastic legislator. Existing literature defines a dynastic legislator as a current legislator with a family member who was elected to a previous congress.<sup>4</sup> A modification of the definition introduced for this paper accounts for family relations across other leadership positions at the local government units like governor for the province and mayor for cities or municipalities. Family relationships across various levels of the local government have been observed in many parts of the Philippines, and it is possible that this feature establishes the linkages between the use of public resources and the implementation of policies and programs for the perpetuation of political dynasties.<sup>5</sup> In mapping the dynastic landscape, we examine the following questions: What is the share of political dynasties in the current 15th Congress of the Republic of the Philippines? What is the share of political dynasties in the major political parties in the Philippine Congress? What is the pattern of gender distribution among political dynasties? What is the age distribution of political dynasties in the current Congress? What is the net worth of political dynasties? Moreover, we begin an assessment of linkages between the presence of political dynasties and socio-economic outcomes: Are political dynasties associated with higher poverty and inequality and weaker human development outcomes? Is the standard of living lower in provinces dominated by political dynasties?

Part 2 provides a review of literature on political dynasties, covering issues such as measurement, tenure, and their linkages to poverty, inequality and other socio-economic outcomes. Part 3 describes the methodology in this paper then Part 4 analyzes the results. A final section reiterates the main findings of this paper.

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<sup>3</sup> Earlier studies have explored political dynasties in the Philippines but with limited coverage: Balisacan and Pernia (2002) and Querrubin (2010a; 2010b)..

<sup>4</sup> See also Dal Bo, Dal Bo and Snyder (2009) and Rossi (2009).

<sup>5</sup> See among others McCoy (1994a) and Hutchcroft and Rocamora (2003).

## **2. REVIEW OF RELATED LITERATURE**

This section presents a review of the issues associated with political dynasties: political tenure, political competition, and the prevalence of political dynasties, and the potential implications for democratic institutions and public policy choice. The extant literature suggests ambiguous results as far as the links between tenure and political performance. Shorter tenure may make politicians pay closer attention to performance and become more responsive to their constituents. However, they could also increase the discount rate on policy pay-off — politicians need to demonstrate immediate results to shore-up support for reelection. Furthermore, the evidence also suggests that political dynasties tend to be self-perpetuating. Political inequality worsens economic inequality, which in turn reinforces the unequal distribution of political power thereby producing a type of “low level democratic equilibrium” where mutually reinforcing forces of weakened democratic institutions lead to poor economic outcomes and vice versa.

### **Tenure, Policy Choices, and Political Competition**

The earlier literature on democracies emphasizes the centrality of elections. More frequent elections — short term lengths — improve accountability and responsiveness of the elected officials (Barro,1973; Ferejohn ,1986). Thus, the underperforming officials could more easily be replaced through elections. Short term lengths also oblige officials to be more responsive to their constituents and to work hard while in office. Politicians with short term lengths tend to lose some measure of discretionary power and are expected to exact lower rents from citizens.

Several studies, however, have recognized the pitfalls of frequent elections and short term lengths because they distract legislators from doing long-term reforms since they are focused on the next elections. Their policy choice could then be myopic. Dal Bo and Rossi (2009) examined the effects of term length on legislative performance using data on the Argentine House of Legislators. Their study exploited a natural experiment in 1983 when the House of Legislators was convened after about a decade of dictatorial rule. To comply with the Constitutional requirement for a staggered renewal of the chamber, a random assignment of two- and four-year terms was given to the legislators, allowing a comparison of the legislative performance between the two groups. Dal Bo and Rossi thus constructed a

performance index built on six sub-indicators of performance like attendance, participation in floor debates (measured by number of speeches), committee activity, the number of bills each member introduced, and how many of these were approved. They found evidence that a longer term was positively linked to overall performance and four of their six sub-indicators of legislative performance.

Similarly, Titiunik (2011) exploited the random nature of term assignment to the state senators after reapportionment in Arkansas, Illinois, and Texas to contrast the behavior of senators with shorter two-year terms and those with slightly longer four-year terms.<sup>6</sup> Titiunik found that term length generally influenced the legislative and spending behavior of senators. Those with shorter terms tended to raise and spend more money when elections were imminent and generally voted as moderates on the floor. Also, the empirical analysis of legislative output suggested that short term lengths may prove detrimental. That is, two-year term Texas senators abstained twice more than their four-year term counterparts; Arkansas senators serving two years introduced about a third fewer bills compared to their four-year term counterparts; and Texas senators serving two-year terms filed 20% fewer bills than their four-year term counterparts. In Illinois, though, both groups of senators abstained and introduced bills at the same rate.

Conconi et al. (2011) examined the link between tenure and politician's legislative behavior with regards to trade liberalization policies since the 1970s. They found that senators who were facing imminent reelection were more likely to assume a more populist and protectionist stance compared to the other senators. Indeed, senators with "safe" seats (and those who already announced their retirement) were less likely to vote in support of protectionist policies. Thus, they concluded that the protectionist effect of election proximity is largely influenced by the motivation to stay in office. Moreover, they argue that these results can be attributed to the following: (1) senators are more vulnerable to lobby pressures when their reelection campaign is imminent, (2) people generally prefer protectionist policies over trade liberalization policies because they can more easily recognize the benefits of the former than of the latter, and (3) there is also the propensity of voters to attach greater weights to recent legislative performance than to overall legislative performance, which

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<sup>6</sup> In the United States, each federal census is followed by a redrawing of districts in order to help ensure that the population is distributed evenly across districts. Reapportionment and redistricting refer to the allocation of political (voting) power based on certain democratic principles (e.g. constituencies based on population size).

increases the costs of adopting unpopular policies when reelection is imminent. Short-term re-election motivations can therefore derail critical structural reforms that have long term gains. In effect, politicians experience an increasing discount rate on policies as they need to demonstrate results up front to sustain political support when frequent elections are the norm.

Dewan and Myatt (2010) discussed the effect of time horizons on the performance of government officials within a theoretical framework. They suggested that the performance of a government official is a function of the security and longevity of the tenure in office. They argued that government officials with long and secure terms perform well because of the high imputed value of the longevity of their political status. The expected cost of losing the post due to underperformance, therefore, is high given that the term length is long. Alternatively, the cost of eviction from office is low if the term length is short. Accordingly, the performance of politicians with short terms is expected to be worse than officials with longer terms.

### **Dynasties, Policy Choices, and Socio-Economic Outcomes**

Dal Bo et al. (2009) examined data on the Congress of the United States since it was established in 1789 to uncover the forces that bring about political dynasties. They hypothesize (1) political dynasties emerge because some families possess certain characteristics (like political ambition and acuity), giving them persistent advantages in the political arena and; (2) political dynasties emerge because political power and influence can be accumulated and bequeathed to family members. In turn, they created two indicators for dynasties. The first is called “Postrelatives,” which is a dummy variable to indicate whenever a legislator has a relative following into Congress *after* the incumbent did and zero otherwise. The other is called “Prerelatives,” which is a dummy variable to indicate whenever a legislator had a relative entering Congress *before* the incumbent did and zero otherwise. Their results show a large decline of political dynasties in the US Congress over time: from 12 percent of legislators that were dynastic between 1789 and 1858 to six percent after 1966.

Then, using instrumental variables to deal with endogeneity, Dal Bo et al. found a causal link between longer tenures in the US Congress and the likelihood that relatives also

enter the Congress.<sup>7</sup> In addition, there was an inverse relationship between the presence of a political dynasty and the degree of political competition within their jurisdictions. One possible explanation, they posited, is that under intense political competition, political parties are forced to field non-dynastic, but talented, candidates over dynastic candidates. Alternatively, they argue that a more discerning electorate that demands greater political competition can effectively nullify the supposed advantages of political dynasties.

Rossi (2009) examined the persistence of political dynasties using data on the Argentine legislature (Lower House and Senate). In this study, political dynasty is measured as a dummy variable that takes a value of one if the legislator had a relative in the Argentine Senate. Ten percent of Argentine legislators were found to have relatives entering future legislatures given that a member of the political dynasty is an incumbent. To deal with the endogeneity issue, Rossi used a natural experiment setting in Argentina where tenure was randomly assigned in 1983. The conclusion was the same: political dynasties owe their longevity to the propensity of political power for self-perpetuation.

Asako et al. (2010) developed a theoretical model of the behavior of dynastic politicians with inherited political advantages. Their model predicted that, first, dynastic candidates possess an electoral advantage over non-dynastic candidates and, second, dynastic politicians pursue distributional programs but do not promote sustained growth because spending on redistribution programs was small.<sup>8</sup> These authors attempted to validate their theoretical model using data on the National Diet (legislature) of Japan. To deal with the endogeneity problem, Asako et al. used the number of male children of previous lawmakers as an instrumental variable since Japanese lawmakers passed on their political seat only to their male children; that is, having male children is a good predictor of dynastic rule.<sup>9</sup> However, the gender of the lawmakers' children would not be linked to the transfer programs

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<sup>7</sup> These authors used regression discontinuity based on the presumed random outcome from close electoral outcomes. They found evidence that legislators who barely won their first reelection were more likely to have a relative enter Congress than those who barely lost their first reelection. In addition, they also instrumented for whether a legislator's reelection attempt is successful using the reelection rate of the legislator's colleagues in the same party in the same state that same year.

<sup>8</sup> These results seem consistent with empirical findings by Solon, Fabella and Capuno (2009) who studied the public education and health spending of Philippine Governors elected in 1992, 1995 and 1998. These authors found evidence that incumbent governors improve their re-election chances with higher spending on economic development services.

<sup>9</sup> During the period between 1996 and 2007, over 90 percent of Japanese politicians are male. Daughters are unlikely to form part of political dynasties. Of over 120 Japanese politicians described as dynastic, only 3 are women (Asako and others, 2010:20).

from the central government. The results indicate that dynastic legislators influence the allocation of distributive benefits to municipalities.

Recent analyses on the Philippine Congress by Querrubin (2010a) found similar results as the extant literature. Defining dynasties in a similar way as the earlier studies above, Querrubin found that over 50 percent of legislators in the Philippine Congress and governors had a relative who was also in Congress or served as governor in the previous 20 years. That is, Filipinos who gained a foothold in Philippine politics are more likely to perpetuate their dynasty compared to their counterparts in the US and Argentine Congresses. In fact Querrubin estimated that the capacity for self-perpetuation of Filipino legislators is three times higher than that of legislators in the United States (c.f., Dal Bo et al 2009).

Although the presence of political dynasties limits broader political participation, the effects on socio-economic outcomes remain ambiguous.<sup>10</sup> The extant literature suggests that democratic systems mediate effects on economic growth through channels like human capital accumulation, public goods provision, access to opportunities, and reduced corruption. Democracies are associated with more predictable long-run economic performance, enhanced stability, better management of economic and political shocks and crises, and even improved distributional outcomes (Rodrik, 2007). For instance, Doucouliagos and Ulubasoglu (2008) found empirical evidence that democracy enhances human capital accumulation through greater investments in public health and education. They argue that increases in the rate of human capital accumulation enables people to vote for the candidates whose platforms will yield the largest investments in human capital. Baum and Lake (2003) and Gerring et al. (2005) also arrived at a similar conclusion. Baum and Lake, for instance, suggest that the effect of democracy on economic growth depends largely on the level of economic development of the country; that is, political democracy has a greater effect on economic growth the higher is the level of economic development. In turn, Gerring et al. (2005) assert that democracy is a stock rather than a flow variable, thereby creating a momentum effect on human capital accumulation. Focusing on the Philippines, Balisacan and Fuwa (2004) looked at economic growth and poverty reduction between 1988 and 1997 by controlling for

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<sup>10</sup> It is important to note here that we are not equating political participation with elected office. Indeed various forms of political participation offer different channels to reflect preferences in public policies. Nevertheless, it is widely held in democratic governance that positions of decisionmaking power afford considerable influence on policy choices and thus also outcomes. This is evidenced by the development of metrics like female representation in elected office as well as measures of dynastic persistence.

contextual factors including a measure for political dynasties. They found evidence that the presence of political dynasties was significant in determining the growth in expenditure but not the reduction in poverty. In addition, their dynasty variable was inversely linked to subsequent income growth.

Nevertheless, it should be pointed out that some studies find the reverse linkage between human capital and democratic institutions. Murtin and Wacziarg (2011), for example, examined the Morrisson and Murtin (2009) dataset of educational attainment covering 74 countries since 1870 and found evidence that primary schooling was a key factor behind the democratic transition between 1870 and 2000. To deal with the endogeneity of education and democracy, they utilized dynamic panel data techniques and found that democracy has no effect on education or average income.<sup>11</sup>

Lee (2005) suggests that the impact of democracy on economic growth depends on the interactions between democracy and societal forces like the government and public sector, the elite, and the civil society. Given an underdeveloped private sector, the government can skew inequality in favor of public servants through the appropriation of the productive resources. If the elite possess the capacity to influence public policy, on the other hand, the state apparatus can be used to strengthen elite-owned industries through, say, special tax rates and other concessions. Or, the government can aggravate inequality through policies that are geared towards enhancing the lives of a specific subgroup of the population. Similarly, preferential treatment for the youth or senior citizens can compromise the capacity of the government to provide adequate services for a larger segment of the society. The eventual development of the public sector can empower a greater proportion of the citizenry with the capacity to articulate their needs to the government. For instance, mature labor groups can effect changes in the manner through which the government distributes resources. Lee therefore posits that democracy tends to increase inequality given inadequate political representation. People, however, have to participate in democracy in order to enjoy the advantages afforded by democracy, and so it is important to have institutions that guarantee accountability to make democracies operate efficiently and pursue equity-oriented measures

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<sup>11</sup> Similarly, Tavares and Wacziarg (2001) found evidence that democracy had a positive effect on human capital accumulation and a negative effect on physical capital accumulation. In addition, Rodrik and Wacziarg (2005) found that democratization has a positive short term effect on economic growth, which becomes less relevant over longer periods.

and initiatives effectively. These institutions prevent rent-seeking behavior and state capture by ensuring that individuals will be made accountable for compromising the capacity of the state to effect positive changes in the level of equality.

Burkhart (1997) investigated the relationship between democracy and economic and political inequality. Using Freedom House indices, he found that the relationship between democracy and inequality is characterized by an inverted-U shaped graph; that is, increases in democracy worsened inequality up to a certain point. Beyond the threshold, further increases in democracy decreased inequality. It seems then that democracy needs to first reach a certain level of maturity before it can effect positive changes in the level of income inequality. He attributes this process to a gradual permeation of democracy and democratic rights into society. The initial inequality is due to the inability of some sectors to recognize and participate in the emerging democracy and the inability of the government to recognize and address the needs of the majority of its constituents. The improvements in the level of equality are therefore indicative of the growing number of participants in the democracy and the recognition of the government of the needs of the greater public.

Plumper and Martin (2003) arrived at a similar conclusion as Burkhart. At the onset of a democracy, the majority of government resources are redistributed to the elite minority as rents because these are the only people equipped to recognize and participate in the new democracy. Greater access to political participation encourages greater civic involvement from more people and builds democratic momentum. As more people participate, government resources in turn are distributed to the majority as public goods. Moreover, as more people participate in the political economy, the elites are obliged to give more concessions to the majority by improving health and education services to justify their elite status. The restriction of political participation could therefore be expected to have adverse effects on the capacity of a democracy to engender greater income equality.

The discussion above implies that political agency and income equality are related. This view is consistent with the relative power theory discussed by Solt (2008) who specifies political power to be a function of income, thus greater levels of income inequality result in greater levels of political inequality. Kuznets (1963) further posits that this relationship is stronger when the average income is low than when the average income is high. Since political power is concentrated in the hands of the wealthy minority, it follows that the state

apparatus will be used to further their interests. Furthermore, Lee stresses that the absence of institutional safeguards against state capture by private interests ensures the gradual worsening of inequality. The unequal distribution of political power, therefore, aggravates income inequality and endangers future economic performance.

Other researchers delve into the effects of democracy on corruption. Drury et al. (2006) posit that democracy mitigates corruption because democracy enables people to remove politicians who they believe are corrupt. In other words, democracy creates the disincentives for corruption to flourish through mechanisms that make it prohibitively costly. Since corruption is believed to inhibit economic growth, it is possible that democracies contribute to economic growth by mitigating corruption. Alternatively, decreases in the level of democracy without corresponding improvements in the capacity of the government to deter corruption, would adversely affect economic growth.

Other research looks into the relationships between democracy and inflation. Desaj et al. (2003), for example, studied the effects of democracy on inflation given different levels of inequality. They found that democracy tends to decrease inflation in countries with low levels of income inequality and tends to increase inflation in countries with high levels of income inequality. Greater democracy could decrease inflation in egalitarian countries because their governments have greater fiscal credibility. So the use of the inflation tax is restricted once a democracy is capable of fielding legitimate challengers to the rule of the incumbent. On the other hand, greater democracy could increase inflation in less-egalitarian countries because their governments are motivated by the rent-seeking interests of the elite that typically lead to fiscal irresponsibility. The elites would tend to favor the creation of money and credit for two reasons: 1) money and credit are channeled to their favored sectors; and 2) the inflation that results from the creation of money and credit erode the real value of the liabilities. Of course, the elites could engage in rent-seeking activities and collude with political dynasties (or field politicians and establish dynastic rule themselves).<sup>12</sup>

In summary, the extant literature indicates that democracy indirectly improves the prospects for inclusive economic growth by boosting the rate of human capital accumulation,

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<sup>12</sup> There is an extensive historical literature on how specific dynasties rose to power in the Philippines, based on economic wealth rooted in rent-seeking, either in the form of land ownership or regulated and protected industries. See McCoy (1994b) for an analysis of the Lopez family and Cullinane (1994) for an analysis of the Durano family. Coronel (1998) analyzes the role of the Cojuangcos in the creation of the Philippines' telephone monopoly PLDT.

improving the provision of public goods, broadening access to opportunities through the reduction of income inequality, and creating disincentives for corruption. Factors that restrict political participation and weaken democracies can therefore be expected to impede economic growth through these channels.

### **Philippine Dynasties**

Journalistic and investigative work also offers specific insights on the phenomenon of political dynasties in the Philippines. Teehankee (2007) from The Philippine Center for Investigative Journalism (PCIJ) has argued that the emergence and persistence of political dynasties stems from the highly unequal socio-economic structure of Philippine society and the failure of the country to develop a truly democratic electoral and party system. The inability of the majority to contest the elite set the stage for the emergence of numerous political dynasties<sup>13</sup>. Coronel (2007) suggests that a combination of factors like wealth, popularity, political machinery, alliances, myth, and violence contribute to the formation of political dynasties.<sup>14</sup> Thus, having wealth is crucial to success because Philippine politics is costly. Sidel (1997) notes that Philippine politicians have to spend an inordinate amount of money to have an effective campaign because of the need to combat and/or engage in vote buying, electoral fraud, and coercion.<sup>15</sup> But political success opens opportunities and resources to enable political dynasties to consolidate and expand their economic and power bases.<sup>16</sup> Coronel notes further that popularity often plays a prominent role in the establishment of political dynasties in the country, especially for the national-level politics. Media glamour lend additional luster to the public images of prospective candidates, making them more attractive to the general public. Teehankee posits that the primacy of the media in elections has enabled a number of politicians to build the foundations of their dynasties upon their projected public images. Name recall and recognition serve to cultivate the image of a candidate, reinforce political viability, and facilitate the emergence of a political dynasty.

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<sup>13</sup> Examples of political dynasties in the Philippines are included in Annex 1. Annex 2 provides an example of a deeply entrenched Filipino political dynasty.

<sup>14</sup> To help illustrate how extensive dynastic links could be, the annex to this paper contains a selected examples of Philippine political dynasties, and a schematic mapping one political clan.

<sup>15</sup> Indeed, Querrubin (2010a:12) found that dynastic incumbents were about 50 percent richer than non-dynastic ones.

<sup>16</sup> Some families transformed their entrepreneurial success to political success in both the local and national level or vice versa. See the analysis in McCoy (1994a).

Still, Coronel believes that wealth and popularity are not sufficient to form political dynasties because political success requires political machinery. She suggests that the success of a political campaign is contingent on the creation of a political network capable of transforming wealth and influence into votes. Indeed, it is through the impersonal, inductive, and coercive mechanisms of the political machinery that wealth is translated into political support and votes. Participation in the political machinery may even allow some measure of political participation by non-elite citizens and thus serve as a "confidence mechanism" to allow for limited redistribution of government resources to those who participate in this machinery (e.g. obtaining through patronage connections a job in a government agency or a reference to private employers; assistance in obtaining loans; etc.). Perhaps this may even be one reason why dynasties are tolerated, and in certain places even accepted, by the general electorate because of this mutually reinforcing network. Prospective dynasties therefore need to draw upon established formal and informal organizations at the local or national level to mobilize resources, manpower, and votes.

Coronel also notes that political dynasties often consolidate their power through mergers, while Sidel adds that several dynasties owe their success to their close affiliation with more powerful political entities. Aligning themselves with the larger and more powerful political families enables prospective political dynasties to draw upon larger pools of resources and broaden their political influence. Political dynasties likewise use strategic alliances to afford themselves advantages against their rivals. In fact, political mergers have been shown to be especially useful in toppling deeply entrenched political powers. Coronel actually believes that several political dynasties owe their emergence and longevity to the myths that surround them and their progenitors as well as ideals and aspirations espoused by the common folk.

According to Coronel, a number of political dynasties complemented their advantages or compensated for their disadvantages with the systemic use of violence and intimidation.<sup>17</sup> Sidel also recognized the reliance of several dynasties on these impersonal and coercive mechanisms to consolidate their respective positions of power. Teehankee attributes this culture of violence to the proliferation of arms at the end of World War II and the inability or

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<sup>17</sup> For a historical account of how some political clans in the Philippines turned to violence and intimidation, see for instance Fegan (1994) and Cullinnane (1994).

lack of desire of the central government to exert control and enforce stricter rules and regulations in frontier regions. Violence or the threat of violence oftentimes effectively deters most dissenters and prospective political rivals from contesting the rule of a dynasty. A long history of politically motivated assassinations reveals that violence also provides some dynastic politicians opportunities to remove or grievously cripple rival dynasties. Both Coronel and Teehankee conclude that the central future of any successful political dynasty is adaptability. The survival of political dynasties is contingent on their capacity to adapt to the changes in the socioeconomic institutions that govern Philippine society.<sup>18</sup>

### **Theoretical Framework**

In theory, democracies promote political equality—equal voice in government decision-making—through one person one vote, equality before the law, and free speech, among others. In turn, such provisions are expected to enhance equal consideration of preferences and attention to the needs of all citizens. In countries where the vast majority is from the lower income segment of society, democratic institutions potentially open the door for more responsive and pro-poor policy-making. This setting is critical in terms of investments in human capital, which are important for long-term economic growth. Democracies could therefore contribute to poverty and inequality reduction as well as promote high and inclusive economic growth.

Nevertheless, there are factors that can weaken political participation and representation. This problem is potentially reflected by the phenomenon of political dynasties. Various factors could contribute to the rise of political dynasties, including the prohibitive cost of running for office, the rising influence of political lobbies, and possible factors influencing voting behavior such as name recall.<sup>19</sup> As noted earlier, belonging to a political dynasty increases one's chances of being elected into office.<sup>20</sup> Dynasties could thus constrain political competition by effectively excluding most citizens from participating in

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<sup>18</sup> Indeed, this seems quite similar to the experience of some European aristocracies which have thrived even with broader democratization and political change in that region. For a discussion, see Lacey (1983).

<sup>19</sup> The elite could become more powerful under maturing democratic regimes for several reasons. First, the elite could possess growing control over the party system as organizations tend to be captured by those who run them. Second, in maturing democracies, more organized and well resourced groups could have growing opportunities to gain power and influence (see Acemoglu and Robinson, 2006; Manacsa and Tan, 2005).

<sup>20</sup> See Dal Bo, Dal Bo and Snyder (2009) on dynasties in the United States, Rossi (2009) on dynasties in Argentina and Querrubin (2010a) on dynasties in the Philippines.

political leadership roles. Once in power, dynastic officials could also (but not necessarily) promote narrower interests instead of the broader public will. Political participation can be further weakened (and dynasties further strengthened) through imperfect information and voter disillusionment. People may misinterpret political platforms and vote for candidates who do not represent their interests<sup>21</sup> or they may altogether dismiss the need to scrutinize political platforms and vote instead along personality or patronage.<sup>22</sup>

Lack of political competition and the prevalence of political dynasties could impact socio-economic outcomes through at least three channels. First, if the prevalence of political dynasties prevents the majority of the citizenry from effectively communicating their needs to the government, it could also prevent the government from appropriately and adequately responding to social and economic problems. The misrepresentation (or inadequate representation) of the excluded groups could skew poverty reduction policies and income redistribution mechanisms, worsen poverty and income inequality, and ultimately compromise the capacity of the government to provide the most necessary public goods. Second, democratic institutions can be further compromised if dynastic officials use the powers of the state for self-serving interests. Finally, dynasties could skew the selection of political leaders favoring those with influence and prevent the best and the brightest from serving in government; thus, in turn, result in sub-optimal policy design and ultimately weaker socio-economic development.<sup>23</sup>

On the other hand, dynastic rule can be argued to provide longer time horizons on which to plan and implement reforms with long-term development objectives. Dynastic politicians owe their longevity to the considerable advantages in resources, credibility, influence, and power afforded to them by their respective families. As noted earlier, politicians with longer tenure could be more inclined to pursue less-populist and long-term development-oriented goals compared to politicians with shorter tenure. Moreover, some politicians with shorter stints in office may ignore (or fail to recognize) the full discount rate of the public goods they provide and tend to provide public goods inefficiently. One possible outcome is that a politician with short tenure and who is seeking re-election may opt for projects and policies with immediate results, providing less emphasis on promising projects

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<sup>21</sup> See Proud'homme (2003)

<sup>22</sup> See Hutchcroft and Rocamora (2003) and Manacsá and Tan (2005)

<sup>23</sup> See Balisacan and Fuwa (2004).

and policies whose returns become visible only under a longer horizon and may therefore become realized under subsequent regimes.

The recognition of longer time horizons can induce improved performance even from rent-seeking politicians. Upon recognizing that their personal pecuniary interests are inimitably tied to the social and economic outcomes of their jurisdictions, these politicians would be inclined to invest in the productive capacities of their jurisdictions. Similar to rational stationary bandits, rent-seeking politicians would work towards ensuring the continued survival and expanding the productive capacities of their constituents (Olson, 2003).<sup>24</sup>

In addition, it is also possible that patronage politics contribute to the survivability of political dynasties. Since patronage politics may be dominant in areas with high poverty and inequality, it is possible that they influence dynastic patterns across the country. Indeed, Solon et al. (2009) found evidence that Philippine Governors enjoy higher success of getting re-elected with larger public spending on education and health, among other development spending items. That study, however, does not account for the possible leakages in development spending which journalistic reports have estimated to be in the range of 12-25 percent for infrastructure projects to well over 50 percent for schoolbooks, medicines and other human capital investment inputs (Parreño, 1998). Some spending may be beneficial to each local jurisdiction and could translate to votes. However, continued corruption and rent-seeking may prove inimical to sustained human capital investment, economic competitiveness and growth in the longer term.

Moreover, political dynasties could have a causal effect on socio-economic outcomes through policy choices made by incumbents; and, at the same time, socio-economic conditions could be part of what explains the emergence of political dynasties. In order to further clarify this point, Box 1 provides a brief description of how patronage politics might play out in terms of intergovernmental transfers like the Priority Development Assistance Fund. Ultimately the effect of political dynasties on inclusive economic growth depends on the

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<sup>24</sup> See Olson (2003) for the discussion of the motivations of the “Stationary Bandit” as opposed to the “Roving Bandit”.

relationship linking dynastic rule with policy choices (and implementation) and, in turn, how the implications of chosen policies on poverty and inequality reduction.<sup>25</sup>

### **Box 1. The Political Economy of the Priority Development Assistance Fund (PDAF)**

The 70 million peso Priority Development Assistance Fund (PDAF) (or more pejoratively called “pork barrel”) of a district legislator can be used on infrastructure projects, livelihood projects, initiatives for improving health, social, and economic conditions of communities, calamity assistance, and the purchase of equipment. Legislators spend their PDAF allocations through the Department of Budget and Management and the appropriate implementing agencies with the cooperation of local government units.

Legislators submit a list of their proposed projects along with a list of contractors and suppliers to the Department of Budget and Management. The DBM then releases the funds to the appropriate implementing agency. The implementing agency executes the project proposal and conducts the necessary bidding processes and coordinates with the local government units involved in the proposal. Once all parties are in agreement, the project is carried out in full by the implementing agency with the approval and cooperation of the heads of the affected local government units.

Despite the presence of the system of checks-and-balances established and enforced by the DBM, the tremendous amount of discretion that a legislator possesses in choosing how to spend his or her PDAF affords him or her numerous opportunities to further his or her political interests. More specifically, the PDAF can be used by legislators to increase the likelihood of their reelection or the election of their relatives and allies. The clientelistic nature of local Filipino politics and the propensity of politicians to label public goods with their names almost always guarantee that Filipinos will view infrastructure, livelihood projects, and welfare assistance as private goods accorded to them by legislators and local government officials. Moreover, the ease by which political capital can be bequeathed to relatives through name recall means that these projects can be used to further the political ambitions of the relatives of legislators. Rocamora (1998) suggests that most Filipinos will respond to the provision of public goods with political support and fealty. The provision of public goods through the use of the PDAF can therefore be used to reinforce existing systems of political patronage and strengthen political dynasties.

Legislators can use their PDAF to further their political interests directly. Rocamora noted the ease by which Filipino politicians can tap public funds for their purposes despite the numerous laws instituted to safeguard against this type of abuse. Parreño (1998) warns that the pork barrel is especially susceptible to abuse. Legislators exert a considerable amount of influence on the bidding processes undertaken by implementing agencies. Legislators choose the projects, the contractors, and the rates at which the projects will be undertaken. Parreño’s research reveals that some legislators have taken advantage of their discretionary powers and appropriated significant portions of their pork barrels for their own purposes. More specifically, the money can be used to fund campaign sorties and election paraphernalia, bankroll campaign personnel, and finance vote-buying operations and coercive activities. The PDAF, therefore, can be used by incumbent legislators to afford themselves and their kin several advantages in elections. These funds channeled through a functioning political machine can guarantee the establishment and survival of a political dynasty.

Sources: Gutierrez (1998), Rocamora (1998) and Parreño (1998).

<sup>25</sup> Few studies have empirically assessed the impact of political dynasties on socio-economic outcomes in the Philippines. Balisacan and Fuwa (2004) is a notable exception. These authors assessed dynasties (which they associated with lack of political competition) and found empirical evidence that these are negatively linked to income growth in Philippine provinces.

Political equality in a democratic setting can help facilitate inclusive economic growth by promoting broader access to public services that enhance human capital and providing better employment and business opportunities to a greater proportion of the population through a more responsive government. Democracy indirectly enhances social outcomes through improvements in the provision of public health and education and the elimination of unnecessary transaction costs and social costs brought about by corruption.<sup>26</sup> The emergence of a truly representative government could bring about these outcomes. Furthermore, a truly representative government is more attuned to the needs of its constituents and as such has an enhanced capacity to respond to economic and political shocks and crises.<sup>27</sup>

Alternatively, political dynasties could also produce strong development outcomes to the extent that they effectively leverage their longer stints in power towards sustained reforms. It is possible that the longer and more secure tenures enjoyed by political dynasties could enable them to pursue long term structural reforms, including the unpopular but necessary ones.<sup>28</sup> Dynastic politicians operate within a longer time horizon and as such have the opportunity to enact comprehensive reform agendas.

The emergence of political dynasties, however, can lead to state capture.<sup>29</sup> The state apparatus can be hijacked by the elite to further their interests. The elite can channel government resources to their industries through preferential agreements, special concessions, and subsidies. Monetary policy can also be used for inflationary policies that primarily benefit the elite (Desaj et al 2003). These aggravate income inequality and result in imbalanced or exclusive growth. The Philippine state apparatus, for example, has been said to be especially susceptible to capture because of its evolution towards the total centralization of patronage resources. The evolution of the Philippine state apparatus throughout the last century has made it progressively easier for the political elite to engage in rent-seeking activities and use public resources for private gain.<sup>30</sup>

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<sup>26</sup> See Doucouliagos and Ulubasoglu (2008) and Krieckhaus and Luszti (2006)

<sup>27</sup> See Plumper and Martin (2003) and Burkhart (1997).

<sup>28</sup> See Dal Bo and Rossi (2009) and Conconi, Facchini and Zanardi (2011)

<sup>29</sup> See Solt (2008) for a general discussion of state capture and Hutchcroft and Rocamora (2003) for state capture within the Philippine context

<sup>30</sup> See Hutchcroft and Rocamora (2003) for a discussion of the evolution of Philippine democracy.

Similarly, a truly representative government can be hijacked by populist interests (Solt, 2008). In its pursuit of representation, this type of government can lose sight of the structural reforms necessary for sustainable inclusive growth. The absence of the necessary complementary institutions and investments can thwart the redistributive efforts of legislator governments. Too much focus on certain sectors in the short run can prevent the government from enacting a comprehensive long term reform agenda.<sup>31</sup>

Table 1 summarizes the potential linkages between political equality and socioeconomic outcomes. First, democratic institutions that promote strong political participation and political equality may produce the conditions for electing capable and responsive politicians, in turn associated with a higher probability of enacting technically correct and politically responsive policies, while minimizing state capture and corruption. These policies could produce both high and inclusive growth, and thus tend to reduce socio-economic inequality. On the other hand, too much responsiveness to the political pressure from the present generation—perhaps brought about by shorter and less stable tenure in public office—may tend to produce policy myopia, in turn leading to sub-optimal socio-economic outcomes based on a longer time horizon. Unequal access to political leadership can result in both desirable and undesirable socioeconomic outcomes. Insulation from political competition affords elected officials longer time horizons with which to enact necessary long-term structural reforms. The absence of competition, however, also provides elected officials more opportunities and more incentives to pursue rent-seeking activities and disavow their duties as public servants altogether. Hence, both shorter and longer tenures in office, along with dynastic links in some cases, could produce both incentives and disincentives for reducing socio-economic inequality.

**Table 1. Political Equality and Socioeconomic Outcomes**

	<b>Decreased Poverty and Inequality</b>	<b>Increased Poverty and Inequality</b>
<b>Political Equality</b>	1. Responsive Populist Government with a Long-term Focus	2. Responsive Populist Government with a Short-Term Focus
<b>Political Inequality</b>	3. Elitist or Dynastic Government with a Long-term Focus	4. Elitist or Dynastic Government oriented towards rent-seeking activities

Note: Based on authors' compilation.

<sup>31</sup> Lee(2005) discusses the pitfalls of a government that caters to short term populist demands

### 3. DATA AND METHODOLOGY

The empirical mapping of political dynasties focuses on the House of Representatives of the 15th Congress of the Republic of the Philippines.<sup>32</sup> Data are collected at the district level, including election results.<sup>33</sup> Socio-economic and demographic profile of the legislators are obtained and matched with the districts.<sup>34</sup> Standard of living, poverty and inequality, and other data are also compiled.<sup>35</sup> For this study, however, the identification of political dynasties is limited to the 12th to 15th Congresses.

#### **Dynastic Measures**

The first step is to obtain a measure of political dynasty. To do this, we use the family name identification approach and applied it to two levels: the House of Representatives and the Local Government Units. The procedure is a standard approach in the literature, but there are several limitations worth pointing out. First, kinship relations can extend beyond consanguinity to include affinity and other relations associated with the extended family setup. Such dimension of kinship relations is particularly relevant when there are intermarriages between political dynasties. Second, two individuals can share the same family name yet they may not be related at all. Third, the starting point in the identification process is the membership of the 15th Philippine Congress: political dynasties that do not have a family member in the current Congress (for whatever reason) end up being excluded in the count. Similarly, given that the coverage of the count is between the 12th and 15th Congresses, other political dynasties also end up being excluded in the count. Nonetheless, we argue that our estimates are minimum measures of political dynasty in the Philippines.

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<sup>32</sup> Article VI, Section 7 of the 1987 Constitution of the Philippines stipulates that members of the Congress (House of Representatives) will serve for a term of three years with reelection up to three consecutive terms. Politicians have found ways around this provision through a number of strategies, including skipping terms or building dynasties (e.g., letting close relatives run in their stead in order to preserve the political seat.) Several bills have been filed to enact into law this constitutional provision like House Bill 3314 (Anti-Political Dynasty Act of 2010) and Senate Bill 2649 (Anti-Political Dynasty Act of 2011). None of these bills have passed committee-level hearings.

<sup>33</sup> Election results are obtained from the Commission on Elections. The Party-List representatives are not included in our database.

<sup>34</sup> There was an attempt to compile a comprehensive list of descriptors for legislators using the survey approach. However, the response rate was too small to be useful.

<sup>35</sup> Economic data are obtained from the National Statistics Coordination Board.

Querrubin (2010a; 2010b), however, notes that datasets that include middle names in the compilation turn out to give similar results to datasets that restrict to family names only.<sup>36</sup>

Hence, a current representative in the 15th Congress is considered to belong to a political dynasty if that legislator shares the same last name with at least one other legislator in the 12th, 13th, or 14th Congresses. The result is called “Dynasty1,” which, in turn, is extended in three ways. “Dynasty2” is defined as a legislator who shares the same last name with past officials at the local government units elected in 2001, 2004, or 2007. To manage the identification, we cover only the governors, vice governors, mayors, and vice mayors. We stress that this adjustment has not yet been done in the extant literature on political dynasties, but it is especially relevant in the Philippines because of the way politicians could work together in influencing the allocation and use of intergovernmental transfers (Box 1). “Dynasty3” is defined as a legislator who shares the same family name with other legislators who served in at least one Congress between the 12th to 15th Congresses as well as with at least one official at the local government units elected between 2001 and 2010. Lastly, “Dynasty0” is defined as a legislator who shares the same family name with another legislator who was a member in the previous Congresses *and* another current member of the present Congresses as well as past *and* present official at the local government units elected between 2001 and 2010. In summary, the four indices are:

- **Dynasty1:** The share of legislators in the 15th Congress with kinship links to at least one legislator in the 12th, 13th, or 14th Congress;
- **Dynasty2:** The share of legislators in the 15th Congress with kinship links to at least one legislator in the 12th, 13th, or 14th Congress, or at least one local government official elected in 2001, 2004 and 2007;
- **Dynasty3:** The share of legislators in the 15th Congress with kinship links to at least one legislator in the 12th, 13th, 14th, or 15th Congress, or at least one local government official elected in 2001, 2004, 2007 or 2010.
- **Dynasty0:** The share of legislators in the 15th Congress with kinship links to at least one legislator in the 12th, 13th, *and* 14th congress *and* at least one other legislator in

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<sup>36</sup> Such problems and other data issues can be minimized through consultations with key resource persons who are more familiar with the local context and ground-level politics.

the 15th Congress as well as at least one local government official elected in 2001, 2004, 2007, and 2010.

#### 4. ANALYSIS OF POLITICAL DYNASTIES

Summary statistics on the 15th Congress of the Republic of the Philippines at the district and province level are shown in Tables 2 and 3, respectively. Estimates on the political dynasty indicators are shown in Table 4. Close to 40 percent of congressmen (84 of 229) have kinship links with legislators in the previous three Congresses. As noted earlier, this initial metric coheres with other measures of political dynasties used in the literature. Nevertheless, there is extensive anecdotal and journalistic evidence suggesting that Dynasty1 needs to be expanded to cover the linkages not just to past members of Congress but also elected officials of the local government units. Thus, dynasty2 indicates that political dynasty increases to 63 percent of the Congress. Roughly 70 percent (Dynasty3) of the district legislators of the 15th Congress possess kinship links to past legislators, past local government executives, as well as present legislators and elected officials of the local government units. Only 10 legislators in the 15th Congress belong to the restrictive category “Dynasty0.”

**Table 2. District Representatives Summary Statistics**

Variable	Observations	Mean	Standard Deviation	Min	Max
Age	229	52.71	12.95	28	85
Tenure	229	1.60	0.73	1	3
Net Worth	229	PhP 53,603,123.05	PhP 109,815,892.56	PhP 1,046,500.00	PhP 1,134,233,000
Margin of Victory	229	31%	24%	0.12%	88%

**Table 3. Provincial Economic Statistics**

Variable	Observations	Mean	Standard Deviation	Min	Max
Poverty Incidence	94	22.726	14.507	0	52.9
GINI	94	0.384	0.05	0.183	0.513
Per Capita Income	94	24,345	7,724	6,664	37,039
Employment	94	93.205%	4.43%	79.6%	100%

**Table 4. Dynastic and Non-Dynastic District Legislators by Definition  
(Total number and percent share)**

	<b>Dynasty0</b>	<b>Dynasty1</b>	<b>Dynasty2</b>	<b>Dynasty3</b>
<b>Dynastic</b>	10 (4.36% of Legislators)	84 (36.7% of Legislators)	144 (62.9% of Legislators)	155 (67.7% of Legislators)
<b>Not Dynastic</b>	219	145	85	74

Table 5 reveals that the proportion of female legislators who are characterized as dynastic is proportional to male legislators who are also characterized as dynastic. This pattern holds across the three different definitions of political dynasty. This finding provides evidence that political dynasties in the Philippines are gender neutral.<sup>37</sup> Table 5 also reveals that the four largest political parties in the Philippine Congress are predominantly dynastic. Take the Nacionalista Party (NP) results, for instance. The NP has highest share of political dynasties in the Congress. It's legislators have fewer kinship links to past legislators (dynasty1) when compared to legislators in other parties but turn out to have extensive connections to executives in local government (dynasty2). What is interesting, perhaps, is that this pattern holds across the major political parties in the Congress. Meanwhile, more than 70 percent of legislators aged 70 and above can be considered dynastic. Younger legislators do not seem to change the pattern of political dynasties. About 77 percent of the youngest legislators aged 26-40 are dynastic. This pattern seems to suggest that the 2nd or 3rd generation members of political families are entering politics as well.

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<sup>37</sup> Dal Bo et al. (2009) observed that political dynasties in the United States may have contributed to greater gender balance in US politics.

**Table 5. Dynastic and Non-Dynastic District Legislators by Gender, Political Party and Age (Total number and percent share)**

<b>GENDER</b>					
	<b>Legislators</b>	<b>Dynasty0</b>	<b>Dynasty1</b>	<b>Dynasty2</b>	<b>Dynasty3</b>
<b>Female</b>	50	3 (6% of Female Legislators)	21 (42.0% of Female Legislators)	32 (64% of Female Legislators)	36 (72% of Female Legislators)
<b>Male</b>	179	7 (3.9% of Male Legislators)	63 (35.2% of Male Legislators)	112 (62.6% of Male Legislators)	119 (66.5% of Male Legislators)
<b>Total</b>	229	10	84	144	155
<b>POLITICAL PARTY</b>					
	<b>Legislators</b>	<b>Dynasty0</b>	<b>Dynasty1</b>	<b>Dynasty2</b>	<b>Dynasty3</b>
<b>LAKAS-KAMPI</b>	76	7 (9.21% of LAKAS-KAMPI Legislators)	38 (50.0% of LAKAS-KAMPI Legislators)	53 (69.7% of LAKAS-KAMPI Legislators)	58 (76.3% of LAKAS-KAMPI Legislators)
<b>Liberal Party</b>	75	1 (1.33% of LP Legislators)	18 (24.0% of LP Legislators)	40 (53.3% of LP Legislators)	43 (57.3% of LP Legislators)
<b>NPC</b>	34	0	17 (50.0% of NPC Legislators)	24 (70.6% of NPC Legislators)	25 (73.5% of NPC Legislators)
<b>Nacionalista Party</b>	21	1 (4.76% of NP Legislators)	7 (33.3% of NP Legislators)	17 (81% of NP Legislators)	17 (81% of NP Legislators)
<b>Total</b>	206	9	80	134	143
<b>AGE</b>					
	<b>Legislators</b>	<b>Dynasty0</b>	<b>Dynasty1</b>	<b>Dynasty2</b>	<b>Dynasty3</b>
<b>26-40</b>	39	4 (10.26% of Age 26-40 Legislators)	18 (46.2% of Age 26-40 Legislators)	29 (74.4% of Age 26-40 Legislators)	30 (76.9% of Age 26-40 Legislators)
<b>41-55</b>	98	3 (3.06% of Age 41-55 Legislators)	34 (34.7% of Age 41-55 Legislators)	60 (61.2% of Age 41-55 Legislators)	63 (64.3% of Age 41-55 Legislators)
<b>56-70</b>	67	2 (2.99% of Age 56-70 Legislators)	21 (31.3% of Age 56-70 Legislators)	37 (55.2% of Age 56-70 Legislators)	41 (61.2% of Age 56-70 Legislators)
<b>70+</b>	25	1 (4% of Age 70+ Legislators)	11 (44.0% of Age 70+ Legislators)	18 (72.0% of Age 70+ Legislators)	21 (84.0% of Age 70+ Legislators)
<b>Total</b>	229	10	84	144	155

Moreover, political dynasties seem to win by larger election margins than non-dynastic candidates. Table 6 reveals that the higher average margin of victory of dynastic candidates (under all definitions) of at least five percentage points is statistically different from zero.<sup>38</sup> Large margins of victory are critical in winner-takes-all environments because political dynasties need to demonstrate that they enjoy sufficient support from their constituents and, more importantly, dispel or invalidate insinuations of vote-rigging and other illicit election-related activities.

**Table 6. Average Margins of Victory of Dynastic and Non-Dynastic Legislators**

	<b>Dynasty1</b>	<b>Dynasty2</b>	<b>Dynasty3</b>
<b>Dynastic</b>	36.43pp	33.34pp	33.26pp
<b>Non-Dynastic</b>	28.49pp	28.23pp	27.64pp
<b>Mean Difference</b>	7.94pp	5.11pp	5.62pp
<b>Test Statistic</b>	2.3477 (0.0094***)	1.5068 (0.0655*)	1.6602 (0.0485**)

Note: pp (percentage points); p-values are in parentheses, \* significant at 0.1, \*\* significant at 0.05, \*\*\* significant at 0.01

In what follows, we focus on the more extensive dynasty definition (i.e. dynasty3) given our main interest in the political and kinship connections that may influence local governance. Are political dynasties richer? Table 7 reveals that dynastic legislators have, on average, PhP10 million wealthier than non-dynastic legislators.<sup>39</sup> This difference in net worth is not statistically different from zero.

**Table 7. Legislators' Net Worth  
(Using Dynasty3 definition)**

	<b>Net Worth</b>	<b>Net Worth (sans MP)</b>
<b>Dynasty</b>	PhP52,012,594	PhP52,012,594
<b>Non-Dynasty</b>	PhP56,913,141	PhP42,155,334
<b>Mean Difference</b>	-PhP4,900,547	PhP9,857,260
<b>Test Statistic and P-Value</b>	-0.2525 (0.4013)	0.7671 (0.2236)

Notes:

- The calculations for both columns exclude Congressman Ronald Singson who was replaced in early 2011. The calculations in the last column exclude Congressman Emmanuel Pacquiao who is an outlier in terms of net worth.
- p-values are in parentheses, \* significant at 0.1, \*\* significant at 0.05, \*\*\* significant at 0.01

<sup>38</sup> Data from the province of Lanao Del Sur have not been compiled by the COMELEC at the time of writing.

<sup>39</sup> One legislator (with a reported net worth of about PhP1.3 billion) and considered as non dynastic in our definition is an outlier in the dataset and was excluded from the calculation.

Finally, Table 8 presents our attempt to analyze the links between political inequality and socio-economic inequality.<sup>40</sup> Measures for poverty incidence, poverty gap, and poverty severity are consistently higher in districts with dynastic legislators compared to other areas. Specifically, jurisdictions with dynastic legislators tend to have poverty incidence of five percentage points, poverty gap that is one percentage point and poverty severity that is half a percentage point higher than other areas. These results are statistically significant. Not surprisingly, the average income of districts with dynastic representatives is lower than that those with non-dynastic representatives. Again, this finding is statistically significant.

**Table 8. 2009 Per Capita Income, Poverty Incidence, Gap and Severity for Dynastic and Non-Dynastic Districts (Using Dynasty3 definition and in percent)**

	<b>Per Capita Income</b>	<b>Poverty Incidence</b>	<b>Poverty Gap</b>	<b>Poverty Severity</b>
<b>Dynastic</b>	Php23,275.43	24.15	6.18	2.31
<b>Non-Dynastic</b>	Php26,872.38	18.95	4.93	1.86
<b>Mean Difference</b>	-Php3,596.95	5.2	1.25	0.45
<b>Test Statistic</b>	-3.565 (0.0003***)	2.606 (0.0039***)	2.107 (0.0174**)	1.794 (0.0367**)

Notes:

- a) Dynasty3 refers to the share of legislators in the 15<sup>th</sup> Congress with kinship links to legislators in the 12<sup>th</sup>, 13<sup>th</sup>, 14<sup>th</sup> and 15<sup>th</sup> Congresses, and local government officials elected in 2001, 2004, 2007 and 2010.
- b) p-values are in parentheses, \* significant at 0.1, \*\* significant at 0.05, \*\*\* significant at 0.01

### **Correlates of Dynastic Prevalence**

A more formal empirical analysis of the correlates between political dynasties, social and demographic profile of legislators, and socio-economic context of districts is necessary to establish the cause-and-effect relations of the variables. It is possible that the correlation of dynastic prevalence with certain outcome indicators becomes less pronounced once confounding factors are properly controlled in the empirics. For now, we examine the links across dynastic prevalence and poverty and inequality, while also adjusting for factors like the population size and employment. Our objective here is to analyze the overall patterns without yet claiming causality.

<sup>40</sup> Poverty incidence measures the proportion of families below the poverty line. The poverty gap refers to the average income shortfall in proportion to the poverty line of poor families. It is the average amount of additional income necessary to bring a family above the poverty threshold expressed as a proportion of the poverty line. Poverty severity is the squared poverty gap divided by the number of poor families. The value of this measure is its sensitivity to the income distribution among the poor.

Tables 9 to 11 present results from partial correlation analysis between the proportion of political dynasties within a province and socioeconomic variables at the provincial level as well (see Annex 3 for details). Controlling for population, employment, and poverty incidence, the partial correlation coefficient between average income and the proportion of dynastic representatives in each province is statistically negative. Various combinations of control variables appear do not alter this finding. In other words, there exists an inverse relationship between average income and the proportion of dynastic representatives on the provincial level. This result might cohere with at least two possible explanations: a) dynasties may not be successful in pursuing or do not pursue policies that raise average incomes; and b) voters with lower average incomes may tend to support dynastic politicians.

Next, controlling for employment or population size (or both), the partial correlation coefficient between poverty incidence and the proportion of dynastic representatives in each province is statistically significant and positive. However, the other results give mixed outcomes. These results are indicative of the multifaceted nature of poverty. Since poverty can be said to be the confluence of a variety of factors, its relationship with the proportion of dynastic representatives in each province is difficult to isolate. Similarly, the partial correlation coefficient between a measure of human development and the proportion of dynastic representatives in each province is statistically negative.<sup>41</sup> Since the index used in the procedure is underpinned by health (life expectancy), education (basic education enrollment rate and high school graduate ratio), and income indicators (per capita income), this result coheres with two possible explanations: a) provinces with lower aggregate levels of health, education, and income tend to elect dynasties; and/or b) dynasties implement policies and programs that may not necessarily improve (or possibly lower) aggregate levels of income, health, and education.

Initially, these results seem inconsistent with earlier findings by Solon et al. (2009) that Philippine local government politicians are re-elected through stronger public spending in education and health. If political dynasties are successful in retaining power, then it is expected that they channel substantial resources towards human capital investments.

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<sup>41</sup> We use HDI-I as the main indicator of human development, as it is more frequently compiled and updated for the Philippines.

However, it is possible that spending does increase—and therefore on the margin it generates political support for the incumbent—but corruption and leakages tend to stifle the impact on human development. Informal investigation by journalists have revealed that from 12-25 percent of budgets for infrastructure projects to over 50 percent of budgets for schoolbooks, medicines and other human capital investment inputs are lost to corruption (Parreño, 1998). This issue requires further empirical analysis.

**Table 9. Partial Correlations of Dynasty3 vs. Per Capita Income**

<b>Controls</b>	<b>Per Capita Income (1997 Prices)</b>
Population	-0.297 (0.004)***
Employment	-0.331 (0.001)***
Poverty Incidence	-0.248 (0.016)**
Pop-Emp	-0.309 (0.003)***
Pop-Pov	-0.246 (0.018)**
Emp-Pov	-0.259 (0.013)**
Pop-Emp-Pov	-0.259 (0.013)**

Note: P-values are in parentheses; p-values are in parentheses, \* significant at 0.1, \*\* significant at 0.05, \*\*\* significant at 0.01

**Table 10. Partial Correlations of Dynasty3 vs. Poverty Incidence and Dynasty 3 vs. GINI**

<b>Controls</b>	<b>Poverty Incidence</b>	<b>Provincial GINI</b>
Population	0.179 (0.086)*	-0.099 (0.345)
Employment	0.217 (0.037)**	-0.077 (0.461)
PCI	-0.56 (0.595)	-0.012 (0.909)
Pop-Emp	0.181 (0.084)*	-0.099 (0.347)
Pop-PCI	-0.050 (0.633)	-0.007 (0.946)
Emp-PCI	-0.039 (0.710)	-0.010 (0.928)
Pop-Emp-PCI	- 0.051 (0.629)	-0.018 (0.868)

Note: P-values are in parentheses; p-values are in parentheses, \* significant at 0.1, \*\* significant at 0.05, \*\*\* significant at 0.01

**Table 11. Partial Correlations of Dynasty3 vs. HDI**

<b>Controls</b>	<b>HDI-I</b>	<b>HDI-II</b>
Population	-0.251(0.015**)	-0.125(0.232)
Employment	-0.293(0.004***)	-0.167(0.109)
Pop-Emp	-0.267(0.01***)	-0.131(0.212)

Note: P-values are in parentheses; p-values are in parentheses,  
\* significant at 0.1, \*\* significant at 0.05, \*\*\* significant at 0.01

## **5. CONCLUSION**

The relationship between political dynasties and socio-economic outcomes is an empirical question. The paper developed metrics on political dynasties in the Philippines and examined them vis-à-vis standard of living, poverty, and human development. This effort has not yet been undertaken prior to our study. It was found that about 70 percent of the 15th Philippine Congress is dynastic. On average, political dynasties are spread across the different age and gender groups of legislators. So there appears to be little, if any, bias against the young or against women. But political dynasties tend to dominate the major political parties; and, on average, they are located in regions with relatively higher poverty levels and inequalities and relatively lower average incomes. Political dynasties tend to be wealthier than non-dynasties. They also win elections by much larger margins compared to non-dynasties. While these findings do not allow us to conclude causality—and this latter point deserves further attention in future research—this paper does point out several important patterns based on empirical evidence. While we cannot say at this stage if dynastic prevalence causes high poverty or vice versa, we can argue that either hypothesis is worthy of the public's and policymakers' attention.

## **Annex 1. Selected Examples of Dynastic Links**

### **1. Marcos**

- Cong. Imelda Marcos is the mother of Governor Imee Marcos and Senator Bongbong Marcos.
- Former Governor Michael Marcos Keon is the nephew of the late President Ferdinand Marcos.

### **2. Singson**

- Former Congressman Ronald Singson and Congressman Ryan Luis Singson are the children of Governor Chavit Singson.
- Congressman Ryan Singson won the 2010 Vice Mayor post in Vigan City before becoming its district representative upon the removal of Ronald Singson from office.
- Vigan City Mayor Eva Medina is the niece of Governor Chavit Singson.
- Governor Chavit Singson is the first cousin of Quezon City Congressman Vincent Crisologo.
- Congressman Eric Singson Jr. and Candon Mayor Allen Singson are the sons of former Congressman Eric Singson Sr.
- Former Congressman Eric Singson Sr. is the brother of Vice Mayor Alfonso Singson and the cousin of Governor Chavit Singson.

### **3. Garcia**

- Congressman Pablo Garcia is the father of Congressman Pablo John Garcia and Governor Gwen Garcia and former GSIS head Winston Garcia.

### **4. Dimaporo**

- Congressman Imelda Dimaporo is the mother of Cong. Fatima Dimaporo and Governor Khalid Dimaporo.
- Cong. Imelda Dimaporo is the wife of former Congressman Abdullah Dimaporo, the son of the patriarch of the Dimaporo dynasty Mohammad Dimaporo.
- Cong. Imelda Dimaporo is the sister of Tubod Mayor Nenita Noval
- Maminta Dimakuta is the cousin of former Congressman Abdullah Dimaporo.
- Pantao-Ragat Mayor Eleanor Dimaporo Lantud is the cousin of former Congressman Abdullah Dimaporo.
- Mayor Eleanor Dimaporo's nephew Ulwan Dimaporo is the Mayor of Sultan Naga Dimaporo.
- Ulwan Dimaporo's father Motalib is the Vice Mayor of Sultan Naga Dimaporo.

### **5. Cerilles**

- Former Congressman Antonio Cerilles is now the Governor of Zamboanga Del Sur.
- Cong. Aurora Cerilles, the wife of Congressman Antonio Cerilles was the previous Governor of Zamboanga Del Sur.
- The son of Governor Antonio Cerilles and Cong. Aurora Cerilles, William Cerilles is the mayor of Dumalinao.
- Lakewood mayor Canuto Enerio is the brother of Cong. Aurora Cerilles

**6. Plaza**

- Cong. Ma. Valentina Plaza is a former governor of Agusan Del Sur. She is the daughter of former governors Democrito Plaza and Valentina Plaza. She is also the sister of former Congressman Rodolfo Plaza.
- Santa Josefa Mayor Glenn Plaza is the cousin of Cong. Ma. Valentina Plaza.

**7. Escudero**

- Congressman Salvador Escudero is the father of Senator Francis Escudero and the brother of Sorsogon Governor Antonio Escudero and Casiguran Vice Mayor Ramon Escudero.

**8. Tan**

- Cong. Milagrosa Tan is a former governor of Samar and the mother of Samar Governor Sharee Tan and Samar Vice Governor James Tan.

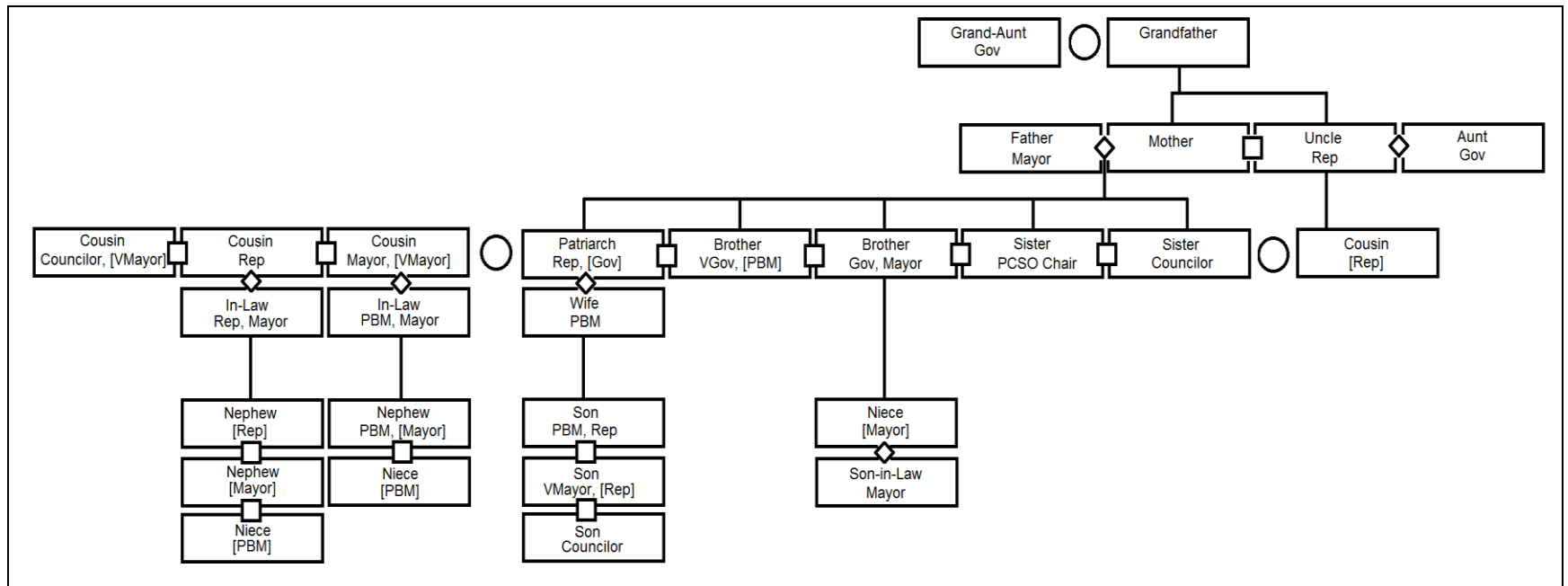
**9. Angara**

- Congressman Juan Edgardo Angara is the son of Senator Angara and the nephew of Baler Mayor Arturo Angara and Governor Bellaflor Angara Castillo.

**10. Espina**

- Congressman Rogelio Espina is the brother of Biliran Governor Gerardo Espina Jr. and Kawayan Vice Mayor Rodolfo Espina.
- Congressman Espina, Governor Espina, and Mayor Espina are the children of former Biliran governor and now Kawayan Mayor Gerardo Espina Sr.

## Annex 2. Kinship Links for a Dynastic Clan in a Northern Province in the Philippines



Source: Authors' elaboration.

Notes:

- Relationships emanate from patriarch
- Circles represent cousin linkages
- Squares represent sibling linkages
- Diamonds represent spousal linkages
- Vertical lines indicate child linkages
- Brackets indicate current positions in government

### Annex 3. Hypothesis Tests for Differences in Dynastic and Non-Dynastic Means

#### 1. Mean difference in Net Worth

	Average	Standard Deviation
<b>Non-Dynastic</b>	42,155,334.92	96,467,934.45
<b>Dynastic</b>	52,012,594.85	76,128,439.11

Test Statistic: 0.7671

P-Value: 0.2236

Note: The calculations exclude former Congressman Ronald Singson and present Congressman Emmanuel Pacquiao (an outlier).

#### 2. Mean difference in Per Capita GDP

##### a. Provincial (1997 Prices)

	Average	Standard Deviation
<b>Non-Dynastic</b>	26,872.38	7,486.73
<b>Dynastic</b>	23,275.43	6,358.38

Test Statistic: -3.5645

P-Value: 0.0003

##### b. Regional (1985 Prices)

	Average	Standard Deviation
<b>Non-Dynastic</b>	20525.12162	13200.07011
<b>Dynastic</b>	13386.77419	7735.058607

Test Statistic: -2.1727

P-Value: 0.015

#### 3. Mean difference in Poverty Incidence

	Average	Standard Deviation
<b>Non-Dynastic</b>	18.9568	14.3460
<b>Dynastic</b>	24.1208	13.3261

Test Statistic: 2.6059

P-Value: 0.0039

#### 4. Mean difference in Margin of Victory (No Lanao Del Sur Representatives)

##### a. Dynasty 1

	Average	Standard Deviation
<b>Non-Dynastic</b>	28.49%	0.2431
<b>Dynastic</b>	36.43%	0.2298

Test Statistic: 2.3477

P-Value: 0.0094

##### b. Dynasty 2

	Average	Standard Deviation
<b>Non-Dynastic</b>	28.23%	0.2389
<b>Dynastic</b>	33.34%	0.2408

Test Statistic: 1.5068

P-Value: 0.0655

##### c. Dynasty 3

	Average	Standard Deviation
<b>Non-Dynastic</b>	27.64%	0.2384
<b>Dynastic</b>	33.26%	0.2406

Test Statistic: 1.6602

P-Value: 0.0485

+AMDG

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