

LEARNING “LOCAL” LANGUAGES: PASSIVE REVOLUTION, LANGUAGE
MARKETS, AND ABORIGINE EDUCATION IN TAIWAN

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ABSTRACT

Title: Learning “Local” Languages: Passive Revolution, Language Markets, and Aborigine

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This dissertation examines contemporary linguistic markets and language policy in Taiwan in terms of the historical processes of state formation, class alliances, and identity politics, drawing upon Pierre Bourdieu’s theory of linguistic markets and Antonio Gramsci’s theory of hegemony as well as the literature on nationalism and linguistic ideology. Emphasis is placed on the historical processes underlying the construction of Taiwan’s linguistic markets as Taiwan’s linguistic nationalism emerged throughout history, focusing on the continuities and changes across Qing, Japanese, KMT and DPP rule.

Accordingly, with language policy always in the background, the dissertation touches on several interrelated issues, including (a) the impact of each ruling historical bloc on Taiwan’s linguistic nationalism, focusing on continuities and discontinuities in language and education policies; (b) the formation of Taiwanese identity as a series of nested concentric circles radiating out from local communities to encompass the nation, the larger Chinese community, and eventually the world; (c) the differential processes of incorporating mountains and plains Aborigines into the state and the resultant differences

in their implementation of state policies; (d) the alternative paths taken by local intellectuals in implementing state policies; and (e) the contradictions between ideology and practice that often besets nationalist projects and the role of “cultural corruption” in bridging the gap.

The findings reveal, among others, that, while Bourdieu’s theory of linguistic markets is useful in understanding the language hierarchy in Taiwan, the historiography of the linguistic markets is critical to an understanding of the political processes underlying their construction. It is here that Gramsci’s theory of hegemony enters the picture. Gramsci’s emphasis on the political process of alliance formation between elite and subaltern groups and the cross-class alliance involved in a “passive revolution” implies that the dominant ideology cannot easily be equated with the class interests of the ruling elite. This questions Bourdieu’s theory that assumes a direct correlation between the linguistic capital possessed by the ruling elite and that valued by the linguistic marketplace. In Taiwan’s case, the value accorded to languages in the marketplace has been a product of political negotiation and competition over control of the Taiwanese nation-state.

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At sunrise I found [the tortoise] butted like a battering-ram against the immovable foot of the foremast, and still striving, tooth and nail, to force the impossible passage ... Their crowning curse is their drudging impulse to straightforwardness in a belittered world.

– Melville, *The Encantadas or Enchanted Isles*

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CHAPTER 1

TAIWAN: A SOCIOLINGUISTIC INTRODUCTION

This dissertation examines contemporary linguistic markets and language policy in Taiwan in terms of the historical processes of state formation, class alliances, and identity politics, drawing upon Pierre Bourdieu's theory of linguistic markets and Antonio Gramsci's theory of hegemony as well as the literature on nationalism and linguistic ideology. Emphasis is placed on the historical processes underlying the construction of Taiwan's linguistic markets as Taiwan's linguistic nationalism emerged throughout history, focusing on the continuities and changes across Qing, Japanese, KMT and DPP rule.

Accordingly, with language policy always in the background, the dissertation touches on several interrelated issues, including (a) the impact of each ruling historical bloc on Taiwan's linguistic nationalism, focusing on continuities and discontinuities in language and education policies; (b) the formation of Taiwanese identity as a series of nested concentric circles radiating out from local communities to encompass the nation, the larger Chinese community, and eventually the world; (c) the differential processes of incorporating mountains and plains Aborigines into the state and the resultant differences in their implementation of state policies; (d) the alternative paths taken by local intellectuals in implementing state policies; and (e) the contradictions between ideology and practice that often besets nationalist projects and the role of "cultural corruption" in bridging the gap.

Introduction

For over half a century, from the 1930s through the 1980s, first the Japanese, and then the Chinese Nationalist Party 國民黨 (KMT, *Guómíndǎng*)¹ waged aggressive campaigns promoting the use of the National Language 國語 (*guóyǔ*) by all Taiwanese. What changed is the definition of what constituted the nation. For neither the Japanese nor the KMT was the island of Formosa considered an autonomous state. The Japanese considered it part of the greater Japanese empire. While some Japanese believed, from the moment the Japanese acquired Taiwan in 1895, that the Taiwanese could and should be fully assimilated into Japanese society, the colonial authorities decided that such efforts were a waste of time and money. That is until the 1930s, when war in the Pacific required a Taiwan that was loyal, obedient, and Japanese speaking. With a few exceptions, Chinese was banned from the local papers. When Taiwan became a part of the Republic of China 中華民國 (ROC, *Zhōnghuá Mínguó*) in 1945, the ROC still dreamed of driving out the “communist bandits” 共匪 (*gòngfēi*) and establishing Nanjing 南京 (*Nánjīng*) as the capital of all of China. Forced to flee to Taiwan in 1949, the KMT leadership maintained the myth that it was the true government of all of China, and that Taiwan was just a province of the greater Chinese nation. This myth was maintained until 1979, when the US officially recognized the PRC government in Beijing. Language played a central role in maintaining this myth. The national language of the ROC is Mandarin Chinese, and the KMT aggressively promoted Mandarin in Taiwan,

starting in the 1950s, prohibiting the use of other languages in the schools, and severely restricting their use in the broadcast media.

After half a century of repression, the surprising thing about the situation of local languages in Taiwan is that some of them are still thriving. Not only do taxi drivers chat away in Hoklo 福佬話 (pronounced “ho-lo”, *Holoee* in Hoklo),² and listen to Hoklo programming on the radio, but even politicians make a show out of learning Hoklo, and use it in their stump speeches. But the extent of the damage caused by fifty years of repression becomes much more obvious when we look at the younger generation. The younger generation might understand Hoklo, but they do not often speak it. The situation is even worse for Taiwan’s other languages, such as Hakka 客家話 (*Kèjiāhuà*, sometimes written as “Hakfa”), and the ten Austronesian languages which still retain active speech communities. (There were 17 such languages recorded by the Japanese at the end of World War II). Hakka, like Hoklo, is a Chinese language, and varieties of both languages have been spoken in Taiwan since the first Chinese settlers arrived in the sixteenth and seventeenth centuries. Both are related to languages still spoken in Southern China and in Chinese communities throughout the Pacific Rim. The Hoklo community accounts for about 70 percent of Taiwan’s current population of 22 million, while only about 15 percent are Hakka speakers (Government Information Office, 2003a). Taiwan’s 439,000 Aborigines, on the other hand, collectively represent less than two percent of Taiwan’s population of twenty three million (2003a). Descended from populations that can be traced back several thousands of years, many Aborigine groups assimilated with early Chinese settlements on Taiwan’s West coast. Those who have

retained their languages reside mostly in Taiwan's high central mountains, or on the remote East coast. Warfare against the Japanese, the KMT's assimilation policies, and economic migration have reduced the population of speakers for the remaining Austronesian languages into the hundreds, or low thousands. One language, Pazeh 巴則 (*Bāzé*) has only one remaining speaker, an 89 year old woman (Blust, 1999).

This dissertation was inspired by the announcement, in 1994, of nation wide curricular reforms that would introduce native language education to Taiwan's schools for the first time in history. It is not, however, so much about the new curriculum (which was first implemented during the 2001-2002 school year, the year after I left the field), as it is about the political and economic changes which led to its adoption, and upon which its success or failure will ultimately depend. The language policies of the Japanese and the KMT were based upon "imagined communities" (Anderson, 1991) that were imposed on Taiwan from above. The new curriculum marks the emergence of a new and uniquely Taiwanese conception of nationhood, one that departs from the monolithic cultural nationalism of the Japanese and Chinese eras. This can be seen in the fact that Hoklo does not simply replace Japanese and Mandarin as the new National Language. To be sure, there are those who desire to make Hoklo the new National Language, but what is surprising is that Taiwan has instead replaced cultural nationalism with multiculturalism. This is not to say that there are not forms of Taiwanese cultural nationalism that compete with the new multicultural framework, but simply that at present these have been effectively marginalized.

Žižek has called multiculturalism the “cultural logic of late capitalism” (Žižek, 1997), and Allen Chun has called Taiwan the first “postmodern nation” (Chun, 2000: 21). There can be no doubt of the significance of the relatively late emergence of a uniquely Taiwanese national identity; however, I argue in this dissertation that the political-economic dynamics underlying contemporary Taiwanese nationalism emerged out of the very process of Taiwanese state formation; a process which started in the late nineteenth century and continued to follow similar forms throughout the late Qing era, the Japanese era, and the early years of KMT rule. Each of these regimes alternated between more conciliatory periods aimed at appeasing the local elites, and authoritarian periods during which brutal repression was used to suppress the development of a local cultural identity. The final, cautious, hesitant, emergence of such a local identity at the dawn of the twenty-first century is predicated upon the compromises, political alliances, and negotiated identity constructs, as well as the political-economic developments that shaped the previous hundred years of rule.

While it is axiomatic that nationalist ideologies tend to either legitimate existing power relationships, or serve as a challenge to them, the link between specific ideological positions and the interests of those they serve is still poorly understood. If official ideology serves to prop up the class interests of the ruling classes, why do so many people embrace this ideology against their own class interests? And, if the opposition ideology challenges the ruling class interests, how is it that even when such opposition ideologies, such as post-colonial nationalisms, become ascendant, the entire social structure can remain relatively unaltered by this transformation? It is possible to answer

this question by breaking the assumption, so often implicit in theories of ideology, that there is a one-to-one correspondence between a dominant ideology and the class interests of the ruling class. As the political philosopher Antonio Gramsci understood, ruling classes never rule alone, but always in an alliance with subaltern classes. Gramsci referred to such alliances as a “historical bloc” (Gramsci et al., 1972: 360). Ideologies, therefore, legitimate the rule of a specific historical bloc, and not just the class interests of the ruling elite. Nor is it the dominant ideology simply an amalgam of each groups class interests, but represents the process of political compromise necessary to secure a working alliance. Ideologies must be understood as being constantly negotiated and re-negotiated between the leaders of allied classes. Moreover, as sociologist Pierre Bourdieu has shown, the resulting ideology need not benefit all members of the historical bloc equally, but simply offer the possibility of social mobility for enough members that the system itself is seen as legitimate (see Chapter 2).

Of course, state power is always ruled by both the carrot and the stick. When it is not possible to co-opt entire sectors of the population into the ruling historical bloc, the state must rely upon outright repression. For most of the twentieth century, military rule was necessary to enforce state ideology. With the emergence of a more democratic and open Taiwan it was no longer possible to impose an ideology that was so contrary to the historical reality of Taiwan’s population. Entire sectors of Taiwanese society had to be integrated into the state as equal partners without radically transforming the nation’s social structure. This process required the creation of a new historical bloc, as well as the

concomitant negotiation of a new national ideology. That this could be peacefully negotiated is the true miracle of Taiwan's transformation.

This dissertation explores this transformation from three perspectives: First, the history of nation building in Taiwan that created the previous historical bloc. Second, the forces that led to the transformation. And third, the effects of both the previous and current historical bloc on one of Taiwan's subaltern populations, the Aborigines. Throughout, language and education policies are set against the process of ethnic formation and the underlying political and economic transformations within which these changes have occurred.

Nationalism and Language, an Anthropological Approach

Nationalism has always been closely linked to the role of language. Most famously, Herder asserted that it was "the possession of its own distinctive language that constitutes the touchstone of a people or *Volk*, the sine qua non of its national identity and spirit" (Bauman and Briggs, 2000: 173). The link between linguistic vernaculars and nationalism is a recurrent theme in all of the classic works on nationalism (Fishman, 1968, Fishman, 1973, Gellner, 1983, Anderson, 1991, Hobsbawm and Ranger, 1992, Breuilly, 1993, Gellner, 1996, Anderson, 2001), and especially prevalent in the literature on Taiwanese nationalism (Fix, 1993, Chun, 1994, Wachman, 1994, Wakabayashi, 1995, Chang, 1997, Chang, 1998, Hsiau, 2000, Ching, 2001, Corcuff, 2002, Wu, 2002, Shih, 2003, Sommers, 2003). Joshua Fishman observed that the tendency to link vernaculars with nationalist authenticity derived from "the ease with which elites and masses alike

could extrapolate from linguistic *differentiation* and literary *uniqueness* to sociocultural and political independence” (original emphasis, Fishman, 1973: 52).

But what is it about language that lends it so easily to appropriation by nationalist projects? One answer can be found in the link between printed language and the construction of “imagined communities” (Anderson, 1991). Benedict Anderson linked the rise of vernacular nationalism to the emergence of print capitalism, especially newspapers, which produced a national community of readers (1991; see also, Eisenstein, 1979).

the fixing of print-languages and the differentiation of status between them were largely unselfconscious processes resulting from the explosive interaction between capitalism, technology and human linguistic diversity. But as with so much else in the history of nationalism, once ‘there,’ they could become formal models to be imitated, and, where expedient, consciously exploited in a Machiavellian spirit. (1991: 45)

But Anderson later goes beyond technology to suggest that there are three features intrinsic to language itself which makes it so readily appropriated: First, the origins of language are lost in history, making them “appear rooted beyond almost anything else in contemporary societies” (1991: 145). Secondly, linguistic performances, such as songs, suggest the existence of a “contemporaneous community”, connecting us to people we do not even know (1991: 145). And third, perhaps most importantly, language presents a semi-permeable boundary. We can learn a language, but it is not easy to do so. It is easiest to do so from birth, for later in life we are likely to be marked by our accent.

If every language is acquirable, its acquisition requires a real portion of a person’s life: each new conquest is measured against shortening days. What limits one’s access to other languages is not their imperviousness but one’s own mortality. Hence a certain privacy to all languages. (1991: 148)

However, having established the link between language and nationalism, Anderson later clarifies that language is not linked with all nationalisms in the same way. Anderson considers “linguistic nationalism” to be a specific type of nationalism,

it began to appear at the start of the nineteenth century in the dynastic empires of Europe, and had its philosophical origins in the theories of Herder and Rousseau. The underlying belief was that each true nation was marked off by its own peculiar language and literary culture, which together expressed that people’s historical genius. Hence enormous energy came to be devoted to the construction of dictionaries for many languages which did not have them at that point—Czech, Hungarian, Ukrainian, Serbian, Polish, Norwegian, and so on. (Anderson, 2001: 40)

This kind of linguistic nationalism did not work the same way in every country. Political realities determined the effectiveness of state’s efforts to shape the linguistic reality of the nation:

In the nineteenth century, for example, Paris succeeded, through control of the school system and most publishing, in reducing the many languages actually spoken in France to the status of dialects or patois. Less successful was Madrid in turning the many languages spoken in Spain (e.g. Catalan and Galician) into mere dialects of Castilian. London came very close to completely eliminating Gaelic as a living language, but today it is making a considerable comeback. (2001: 40)

In looking at contemporary linguistic nationalism in Asia, he remarks that the success or failure of linguistic nationalism bears little relationship to the strength of individual nationalisms. He points out that Indian nationalism is not any weaker than Chinese nationalism simply because of India’s continued dependence on English as the national language (2001: 42). Anderson also sees differences between the print capitalism of the nineteenth century and the kinds of nationalism enabled by electronic mass media. He argues that television’s reliance on images makes language less important than it once was. After all, it is fairly trivial to broadcast the same television image in multiple

languages (2001: 42). He also argues that new electronic media allow for “long-distance nationalism” to flourish among diasporic communities (2001: 42), spreading the boundary of the imagined community beyond the geographical borders of the nation-state.

The study of the links between language and nationalism has, in the past two decades, received considerable anthropological attention, under the rubric of the study of “language ideology” (Woolard and Schieffelin, 1994, Kroskrity, 2000a). The contributions of this new literature can be grouped into two categories. At the micro level, anthropologists have contributed to understanding the links between observable linguistic behavior and language ideology (Hill, 1998), while at the macro level, they have shown how historical transformations have affected the language attitudes of entire communities (Woolard, 1989, Woolard and Gahng, 1990, Gal, 1993). The key insight brought to bear by the anthropological approach to the study of language policy, as opposed to other competing approaches which have emerged contemporaneously, such as that of “linguistic ecology” (Muhlhausler, 1996), is the anthropological focus on *process*. Whether at the micro or the macro level, anthropologists are interested not simply in historical changes, but in understanding the role of human agency both in bringing about and responding to these changes.

Blommaert’s “historiography of language ideologies” (Blommaert, 1999: 1) emphasizes macro level historical process.

In any attempt to understand how and why some views of language gradually emerge as dominant while others are suppressed and marginalized, we need to attend to the historical processes that inform the

dynamics of social power as these obtain in specific debates over language
 ... (Johnson, 2002: 551)

Blommaert's historiographical approach is clearly present in the anthropological study of "colonial linguistics" (Errington, 2001). Joseph Errington looks at how the construction of colonial and postcolonial linguistic work, much of it done by missionaries, "gave rise to new, language-linked socioeconomic stratification that served political and economic agendas of the colonial states that sanctioned their work" (2001: 25). And Johannes Fabian, in his seminal study of *Language and Colonial Power* in the former Belgian Congo, traces the development of Swahili as a "one-way conduits for command and persuasion" in the coal-mining region of Katanga (Fabian, 1991: 136).

In surveying the literature on language and ideology, I observed that there exists an underlying tension between the assumption that ideologies represent specific group interests and the reality in which group interests prove to be much more diverse than such a simple one-to-one mapping of ideology and interests seems to warrant. In Paul Kroskrity's introduction to his edited volume, *Regimes of Language* (Kroskrity, 2000b) he lists four features of language ideologies. The tension I speak of emerges out of his discussion of the first two - the first being the link between ideology and group interests:

language ideologies represent the perception of language and discourse that is constructed in the interest of a specific social and cultural group. (2000b: 8)

And the second being the diversity of "meaningful social divisions" within groups:

language ideologies are profitably conceived as multiple because of the multiplicity of meaningful social divisions (class, gender, clan, elites, generations, and so on) within sociocultural groups that have the potential to produce divergent perspectives expressed as indices of group membership. (2000b: 12)

Kroskrity realizes the challenge posed by the disjunction between these two features of language ideology, which poses the question as to how group interests come to be associated with particular ideologies when the groups themselves are so diverse and language ideologies are sites of “conflict and contestation” (2000b: 12)? Whenever these questions arise, two theorists always seem to be invoked: Pierre Bourdieu and Antonio Gramsci. Kroskrity uses Bourdieu to discuss how ideologies come to be “successfully ‘naturalized’ by the majority of the group,” and Gramsci to discuss how “state-endorsed hegemonic cultures” are imposed through “struggle and adjustment between states and their opponents” (2000b: 12-13). This is a formulation that is traceable to Kathryn Woolard’s seminal essay “Language Variation and Cultural Hegemony: Toward an Integration of Sociolinguistic and Social Theory” (Woolard, 1985), and which was more recently revisited by Niloofar Haeri (Haeri, 1997), and is also addressed by a forthcoming essay by F. Niyi Akinnaso (Akinnaso, forthcoming). The literature emerging around these questions falls within the larger framework of language ideology, but its particular focus on the relationship between language and theories of political economy justify categorizing these works as “language and political economy” rather than simply language ideology, and places it alongside a growing body of work in this area (Woolard, 1985, Friedrich, 1989, Gal, 1989, Irvine, 1989).

Peripheral Identities and Education in East Asia

In addition to the relationship between group interests and ideology, which I discuss in depth in Chapter 8, my research also draws from a growing body of anthropological

research into education, ethnic identity, and nationalism in East Asia. This literature seeks to understand the role of the periphery in the construction of the nation-state (Harrell, 1999). These issues are particularly salient in the East Asian context where rapid political and economic change has forced states to invest in the construction of new national discourses to maintain their legitimacy (Harrell, 1995, Ong and Nonini, 1997, Huang and Hsu, 1999). Because of the importance of education to the national project, the specific links between minority education and nationalism in China and Taiwan have also begun to attract increased academic attention (Borchigud, 1995, Huang and Hsu, 1999, Postiglione, 1999). Previous studies of education and nationalism in Taiwan have shown how the curriculum's strong emphasis on teaching Confucian morality was linked to notions of nationhood (Meyer, 1988a, Meyer, 1988b, Stafford, 1995). Similarly, military discipline in the schools, such as military training classes aimed at preparing students to defend the island against an attack by the Mainland (Strawn, 1999) also served to strengthen official nationalism while repressing the emergence of alternative nationalisms.

Taiwanese debates about the education reform (see Chapter 2), parallel those in the United States where there has long been a debate between those who think that immersion into mainstream cultural standards would better help disadvantaged children from minority backgrounds, and those who think that better understanding one's own culture and language will best prepare one to enter the educational mainstream (Collins, 1999). More than anything else, my research aims to show the extent to which these debates are shaped by the political, historical, cultural, and economic context in which

they are framed. In doing so, my research contributes to several overlapping discussions within the field of education about: (a) the role of the state in educational policy (Dale, 1989, Apple and Aasen, 2003), especially with regard to language planning (Akinnaso, forthcoming, Tollefson, 1991, Tollefson, 2002), (b) the development and implementation of “multicultural” curriculums that reflect local cultural traditions (Giroux, 1981, Giroux and McLaren, 1994), particularly among indigenous peoples (Hansen, 1999, Hansen, 1999, McCarty and Bia, 2002), and (c) the role played by educational institutions in reproducing race-based social inequalities (Ogbu, 1978, Ogbu, 1982, Ogbu, 1987, Gould, 1999, Ogbu, 1999, Ogbu, 2003). By conceptualizing policy studies as process, I hope to contribute to educational practices that take into account the needs and concerns of local learning communities, especially those that have been historically marginalized by the educational system.

The Language Socialization of the Anthropologist

I first arrived in Taiwan in January of 1991, after having backpacked my way through China, Pakistan, Indonesia, and Southeast Asia over the preceding seven months. While in China the Westerners I met who spoke the most fluent Chinese had all come to study in Taiwan. Not only was I informed that Taiwan had the best Mandarin language schools, but I also learned that it was easy to make money teaching English at Taiwan’s many cram-schools 補習班 (*bǔxíbān*) for students preparing for their exams. 1991 was an interesting year for Taiwan. Martial law had ended just a few years before, in 1987, and a palpable sense of excitement was in the air. Public protests were common, and people

were experimenting with new forms of identity politics. On that trip I became aware of the Aborigine Rights Movement 原住民主權運動 (*yuánzhùnmín zhǔquán yùndòng*), and heard stories about how people had been punished (e.g. beaten, forced to wear a placard, or fined) in school for speaking Hoklo. I saw fights in the legislature on TV as the opposition party fought for democratic reforms. All of these things stayed with me as I went back to college, and then graduate school. When I became interested in studying the relationship between language policy and political economy, Taiwan seemed an obvious choice. There was one problem, even after years of Chinese study, my Mandarin was still far from where it needed to be to conduct research, and I spoke none of Taiwan's local languages.

Language skills are something that Anthropologists rarely discuss in their ethnographies (Owusu, 1978: 313). Occasionally we get glimpses, such as when Stevan Harrell writes:

For the first six weeks, I employed an interpreter to translate my Mandarin Chinese into the villagers' Hokkien [Hoklo] and back again, but when he left to go to college, I interviewed and interacted almost exclusively in the Hokkien language, I started out missing things, but learned fast, out of necessity. (Harrell, 1982: viii)

Having heard second hand reports on how excellent Harrell's Chinese skills are, I am apt to believe that he did, indeed, learn fast and did not miss much. But how many anthropologists are actually such fast learners? I know that I, for one, am not. I had studied French from fifth grade through twelfth, spent two summers studying in France, and I still am only minimally conversant (although my comprehension is better than my speaking). Because of my own difficulty with language learning, I often wish for a little

more anthropological reflexivity (Ruby, 1980) regarding the relationship between language learning and fieldwork.

I was able to audit a course in Hoklo at the University of Pennsylvania, one of only a handful of such courses in the country, mainly targeting second generation Taiwanese who are interested in doing business in Taiwan. Then, in 1997, I secured a Fulbright scholarship to study at Taiwan's premier language school, the International Chinese Language Program 國際華語研習所 (ICLP, *Guójì Huáyǔ Yánxí Suǒ*) at National Taiwan University 國立台灣大學 (*Guólì Táiwān dàxué*). This was, without exaggeration, one of the most difficult years of my life. The style of learning at ICLP is similar to that of a Taiwanese school, emphasizing great feats of memorization; we were expected to remember entire dialogs and hundreds of Chinese characters each day. I was truly beginning to despair when the teacher of one of the classes I was having the most difficulty in asked me to take a class with her the next semester. I was dumbfounded, since I was performing so poorly in her class. However, she informed me that she was taking classes at National Taiwan Normal University's 國立師範大學 (*Guólì shīfàn dàxué*) program for teaching Chinese as a foreign language 華語文教學研究所 (*Huáyǔwén Jiāoxué Yánjiùsuǒ*), where she had been exposed to some alternative teaching techniques, not usually used in ICLP's conservative classrooms, and she wanted to experiment on me. It was a revelation! Rather than struggle with memorizing text before discussing it in class, the order was reversed. We would spend days listening to and discussing the text without books, and then work on vocabulary and grammar drills after we had become familiar with the texts. I did much better, and was able to perform well in

class with much less struggle. During this time I was also taking Hoklo classes, but that was unfortunately not progressing as well as I would have liked.

One of the things I learned through my experience at ICLP was invaluable. I had personally experienced the planned educational reforms that I had hoped to study. Apart from the language and identity issues I hoped to focus upon, one of the major impetuses for reform was to replace the emphasis on rote memorization with a more communicative and engaging style of learning (Lii-Shih, 2002), long advocated by educational reformers in the America (but not necessarily implemented in most American classrooms). Despite my progress, after a year of intensive study, I still did not feel that I had the necessary communicative competence to begin my fieldwork. I decided to extend my research an additional year and spend the time auditing classes at Taiwanese universities, where I could familiarize myself with local debates surrounding language and education reform. With the support of a visiting position at the Institute of Ethnology 民族學研究所 (*mínzúxué yánjiùsuǒ*) at Academia Sinica 中央研究院 (*Zhōngyāng Yánjiùyuan*), I was able to audit classes on educational history, language policy, sociolinguistics, and even a course on Paulo Friere, as well as attending every conference I could on educational reform, anthropology, and language policy.

I continued to study Hoklo, but it simply was not coming as fast as my Mandarin. I eventually decided against going to a primarily Hoklo speaking community, as I had originally planned, and instead looked for an Aborigine community, knowing that Mandarin would be the primary language of communication. I am very happy that my linguistic ineptness forced me to make such a decision, because I ended up gaining

valuable insights into Taiwan's ethnic politics that I would never have gotten otherwise. A classmate in my Paulo Friere class was on the education board at the Education and Culture Department of The Council of Aboriginal Affairs at the Executive Yuan 行政院原住民族委員會 (*Xíngzhèngyuàn Yuánzhùmínzú Wěiyuánhui*), and he was able to arrange a series of meetings which eventually secured me an invitation to spend a year living in the faculty dorm of a primary school in a rural Aborigine village on Taiwan's bucolic East coast. Once I saw the location of the school, nestled in the foot of the mountains, I made up my mind.

Even after arriving at the school, however, my language skills were still limited. The academic language I had learned at ICLP, and improved in university classes, bore little resemblance to the Taiwanese Mandarin 台灣國語 (*Táiwān Guóyǔ*) spoken in rural Taiwan. Living immersed in the environment, I was able to absorb the local vernacular, much to the dismay of my Mandarin teachers at ICLP who scolded me for my "bad habits" when I visited them in Taipei. After about three months in the field I was ready to conduct interviews. This learning process made me very sensitive to the distinctions between the various forms of Mandarin spoken in Taiwan. Unfortunately, so focused was I on trying to get my Mandarin to the level where I could avoid embarrassment, that I never had time to pick up any of the local languages spoken in the village (which included Hoklo, Hakka, Amis, and Bunun). For the most part this was not a problem, although it did limit my ability to speak with some older villagers who had only limited Mandarin skills.

Structure of the Dissertation

This dissertation starts, in Chapter 2, with a historical account of the political and economic forces that resulted in Taiwan's recent education reforms. This account draws on a Gramscian framework of history, which is set out in the beginning of the chapter and further elaborated in Chapter 8. Central to such an account is the relationship between nationalist ideology and the political process of alliance formation between elite and subaltern groups. After providing a detailed account of Taiwan's sociolinguistic profile and history, I explore the proximate historical causes of the reforms implemented in the 1980s, as well as their consequences for Taiwanese nationalist ideology. The reforms came in two stages, the "new social studies education" of the eighties and nineties, and the "9-year integrated social studies" curriculum of the new millennium (Liu and Hung, 2002: 572), after examining each of these separately, I then move beyond the curriculum to look at parallel developments in the construction of "local" Taiwanese culture. Finally, having established the social and historical context, I discuss the native language curriculum itself.

Chapter 3 explores the emergence of a uniquely Taiwanese Hoklo ethnic identity during the eighteenth and nineteenth centuries. Political and economic developments during this period are discussed in the context of a history of Qing era education, and the forms of cultural capital that were institutionalized during that period. This period is crucial for understanding later developments, since it was at the end of this period, just before the Japanese arrived in 1895, that many of the key features of Taiwan's political economy were established. Central to the history of this period, as it is the history of any

settler state, is the story of the displacement of the indigenous population. One of the unexpected discoveries in writing this dissertation was the crucial link between land policy and education policy in each stage of Taiwan's history. Land was central to elite power, and land policies defined relations between Chinese and Aborigines. The rise of local elites was, in turn, directly linked to the establishment of the Qing education system in Taiwan. The rise of local elites is also part of the history of factional violence and rebellion, which marked so much of this period in Taiwanese history. I also explore how education was used as a means to reward loyal Aborigine populations, and the role of Confucian morality in Aborigine education.

Chapter 4 explores the history of nationalism in Taiwan. I show that the power structure, what Gramsci refers to as a "historical bloc" (see Chapter 8), established during the Japanese colonial era was very similar to that later adopted by the KMT, even as Chinese nationalism replaced Japanese nationalism. I explore the extent to which the transition from Japanese to KMT rule was both a radical departure and a continuation of a set of relationships that had already congealed at the end of the Qing era. Despite the best efforts of both regimes, local languages continued to flourish in Taiwan. I look at those features of Taiwanese state formation that limited the state's power to arbitrarily impose language markets. Throughout both periods coercive rule was the norm; however, I argue that even in such situations a certain degree of legitimacy is necessary for the functioning of the state, and the creation of language markets in the National Language was central to the manufacture of consent. I end with a discussion of the break down of this legitimacy and the forces that later forced the changes discussed in Chapter 2.

Chapter 5 explores the links between language and nationalism by looking at two contemporary debates in Taiwanese society. The compromise between Taiwanese and Chinese nationalism reached in the 1990s led to the adoption of a view of Taiwanese identity as a series of concentric circles radiating out from local communities to encompass the nation, and then the greater Chinese community, and eventually the world. However, as the balance of power in Taiwan has shifted in favor of the opposition Democratic Progressive Party 民主進步黨 (DPP, *Mínzhǔ Jìnbù dǎng*), this compromise has increasingly been called into question. Language issues have played a key role in shaping this debate. First, I explore the debate over a national orthography. By choosing to adopt a Latin orthography the DPP seeks to reach out to the international (non-Chinese speaking) community, and yet by rejecting the standard used in Mainland China, they do so in a way that challenges the view of Taiwanese culture as embedded within the larger Chinese cultural sphere. The second issue I explore is English education. Here again, Taiwan seeks to enhance its status as a member of the international community by promoting English education. While Taiwan's elite have long had access to private English education, many even studying abroad in the United States, attempts to democratize access to English education have been controversial. I explore the question of whether such attempts are genuine efforts to level the playing field, or perhaps are yet another avenue for imposing Taiwanese linguistic nationalism.

Chapter 6 sets the stage for the ethnographic account of education in a rural community on Taiwan's remote East coast provided in Chapter 7 by discussing the unique history of Taiwan's mountains and eastern regions. In discussing the Qing era,

when Aborigine policy focused mostly on those Aborigines inhabiting the same western plains as the Chinese settlers, it is possible to address Aborigine policy together with those governing the Han Chinese population; however, under the Japanese Aborigine policy refers primarily to policies governing the mountain region, rich in valuable camphor, and the remote East coast. In Chapter 6 I explore Japanese and KMT Aborigine policies, focusing on language and education. I argue that the current ethnic differences between “mountain” and “plains” Aborigines in Taiwan is largely due to the different processes by which each group was integrated into the state. During the Japanese the mountain area was cordoned off and subject to a massive military occupation intent on killing and subduing the Aborigine population. The system of police-run schools set up during the Japanese era was abandoned by the KMT, who sought instead to fully assimilate Aborigines into mainstream Chinese society. In this context I also explore the local history of eastern Taiwan, where I conducted my fieldwork, since it was shaped by the same policies that governed the Aborigine population. The integration of this remote region into the rest of the country also saw the integration of the Aborigine population into the lowest rungs of Taiwanese society.

Chapter 7 paints a portrait of a rural community on Taiwan’s eastern plains. I explore how the policies of promoting “local” languages and culture are actually implemented in the community around a small primary school with a predominantly Aborigine student population. I contrast this community with that surrounding another nearby school which, although only a short distance away, is considerably different because of the different ways in which the mountain Aborigines who live there were

integrated into the community. Then, drawing on Gramsci's theory of "intellectuals," I explore how two local intellectuals implement state based cultural initiatives. Each of the intellectuals represents different local constituencies and is dependent upon different sources of state funding. The first is a local volunteer cultural worker. A highly educated businessman, who devotes his free time to community building and cultural events, as well as collecting local histories, he is primarily interested in regional boosterism. The second is a primary school principal who is also an Aborigine woman. She is a fierce advocate for Aborigines, but she sees defines her goal primarily in terms of securing state funding for Aborigines students. Despite their differences, both the cultural worker and the school principal end up reproducing stereotyped portrayals of Aborigine culture as primarily embodied in traditional dance performances. The main difference between them lies not in their conception of local culture, but in the populations each of them targets. The cultural worker primarily focuses on the Hoklo and Hakka speaking middle class, while the Principal works hard to ensure that the poorer Aborigine population is able to gain something from the state funds she secures. I then look at a third local intellectual, a young Aborigine schoolteacher who decides to give up teaching to become a Presbyterian minister. I explore the ways in which Taiwanese multiculturalism forced this schoolteacher to seek an alternative framework within which to help his fellow Aborigines.

In Chapter 8, drawing on Gramsci's historical writings, I refigure Bourdieu's theory of Language Markets, giving greater emphasis to the political and economic processes by which linguistic markets are formed. In doing so, I avoid the simplistic

correlation of hegemony with the class interests of the ruling elite, by showing how the incorporation of subaltern groups into an alliance with the ruling bloc requires the creation of new linguistic and cultural markets. The creation of these new markets, I argue, is an essential feature of post-colonial nationalism. I then look more closely at Gramsci's own writings on nationalism, exploring the links between nationalism and modernity. In particular, I explore Partha Chatterjee's application of Gramsci's theory of Passive Revolution to post-colonial nationalisms, and the role that modernity played in shaping such nationalisms. Then, drawing on Peter Ives study of the linguistic roots of Gramsci's theory of hegemony, I contrast Gramsci's approach to social reproduction with that found in Bourdieu, highlighting the importance of historical processes such as state formation and globalization as has been observed in recent anthropological work grounded in Bourdieu.

Finally, in the concluding chapter (Chapter 9) I discuss what linguistic nationalism in Taiwan can teach us about the theoretical issues discussed in Chapter 8. The traditional approach to discussion nationalism is to categorize countries into various taxonomic classifications; I offer an alternative grounded in Bourdieu's theory of linguistic capital and Gramsci's theory of hegemony. I look at what decentralization of Taiwan's linguistic markets means for linguistic nationalism, especially focusing on those at the bottom of Taiwan's linguistic hierarchy: Aboriginal speakers of Taiwan's Austronesian languages. I then look at the current struggle between those who favor a multi-layered notion of identity and those who promote replacing Chinese nationalism with Taiwanese nationalism, and how despite their symbolic importance in this struggle,

Aborigines are often sidelined. I conclude by suggesting that Taiwan has entered a critical period of struggle over its national and linguistic identity

Notes

¹ As discussed in Chapter 5, the question of which orthographic system to use is a highly political one. By choosing Hanyu Pinyin I do not mean to intervene in this debate, but simply to use the system I am most familiar with, and which is the standard for scholarship conducted in the United States. I consider orthography to be primarily targeted at the non-native speaker since most Taiwanese do not rely upon orthography but read the Chinese characters directly. I have accordingly provided the Chinese characters wherever possible. It is common for Taiwanese names to be written in a variety of orthographic systems (and sometimes to invent new spellings not existing in any known system). It is here that having a standard orthography can help overcome confusion. In the case of Japanese and Austronesian phrases I tried as best as possible to provide the Chinese characters which would help scholars who only know Chinese identify the phrase, even if they are unfamiliar with the orthographic representation that is used

² It is sometimes simply referred to as Taiwanese 台灣話 (*Táiwānhuà*), but out of sensitivity to speakers of Taiwan's other languages, is now referred to as Hoklo (sometimes spelled Holo), and this is the term that will be used here (Chiung, 1999; Heylen, 2001: 10, n. 10; Hoklo.org, 2003). The other term, Southern Min, (also variants such as Minnaneese) is no longer used for both scientific and political reasons. On the one hand, the language spoken in Taiwan is now quite different from that still spoken in Fujian province (where the Min river runs). And, there is also a political desire to distance Taiwanese identity from that of Mainland China.

CHAPTER 2

LOCAL CULTURES, LOCAL LANGUAGES: THE POLITICAL ECONOMY OF
LANGUAGE AND EDUCATION REFORM IN TAIWAN

Taiwan's Passive Revolution

In the 1990s Taiwan made a historic break with the Chinese nationalist ideology, which had legitimated the power of the ruling party for the previous forty-two years. What is remarkable about this break is not so much the abandonment of a vision of China which had become more absurd with each passing year, after all, it has already been decades since anyone seriously considered the possibility of reclaiming mainland China and re-establishing the Republic in its previous capital of Nanjing; rather, what was remarkable was the fact that Chinese nationalism was not replaced with Taiwanese nationalism. Taiwanese nationalism had emerged, over the course of the seventies and eighties, as a viable alternative. There was a nostalgic literature about lost peasant values, there was a historiography that highlighted the uniqueness of the Taiwanese history, emphasizing Dutch and Japanese colonial rule, as well as Taiwan's status as a renegade frontier during the Ming and Qing eras. Finally, there also existed a language, Hoklo, spoken by nearly three quarters of the population, which stood ready to be claimed as the official language of the Taiwanese nation. However, instead of replacing Chinese nationalism with Taiwanese nationalism, Taiwan's leaders engineered a compromise between the two. Under the leadership of KMT President Lee Teng-hui 李登輝 (*Lǐ Dēnghuī*), Taiwan adopted a multiculturalist ideology which effectively undermined

efforts to promote Taiwanese nationalism by doing three things: First, it served to deligitimate a vision of Taiwanese nationalism grounded in Hoklo culture, by placing it on equal grounds with Taiwan's Hakka, Mainlander, and Aborigine cultural traditions. Secondly, it avoided a wholesale rejection of Chinese nationalism by viewing culture as a series of concentric circles, radiating outward from individual communities, to the entire Taiwanese nation, but also beyond to include the greater Chinese cultural sphere and global culture as well. And third, as Wu Rwei-Ren points out, it served to effectively enhance the power of the native elite within the KMT without relinquishing power to those outside of the party (Wu, 2002: 200).

Both Wu and I have argued that this transformation in Taiwanese ideology is best understood as a "passive revolution" in the Gramscian sense (Friedman, 2002; Wu, 2002: 200). Gramsci used the term to distinguish between genuine populist revolutions, such as the Jacobin revolution in France, and top-down elite-driven revolutions such as the *Risorgimento* in Italy. I discuss Gramsci's theory of passive revolution in detail in Chapter 8, but here I wish to highlight what I consider to be its defining feature: the lack of a political alliance between elite and subaltern classes. Whereas in the French revolution, the bourgeoisie was forced to make an alliance with the French peasantry against the aristocracy, in Italy the bourgeoisie allied with the Southern aristocracy against the peasants. This resulted, Gramsci argues, in France having a more organic national language and culture, as opposed to the more "cosmopolitan," elite, and European culture and language of Italy (Gramsci, 1985: 246). In essence, Gramsci saw national ideology as defined not simply by the interests of the ruling elite, but as the

outcome of a political process in which the ruling elites forged political alliances with other groups. The new national ideology represents the generalization not simply of the aggregate interests of the allied groups, but of those shared interests, which allow them to form and maintain their alliance. Gramsci referred to such ruling alliance as “historical blocs.”

I differ from Wu in interpreting the underlying dynamics of Taiwan’s passive revolution. Wu sees this largely in terms of ethnicity and party affiliation. He starts by pointing out the way in which the KMT divided local elites by incorporating some of them into the party system, while excluding others.

it should always be borne in mind that the KMT's system of clientism also divided the native elite into two groups, one inside the KMT and the other outside of it. Differentially situated in the structure of power game (sic.), these two groups developed, for all their common interest in nativizing the state, different interests and thus different preferences as to how to achieve this goal (Wu, 2002: 200)

While correct, this analysis treats elites as autonomous entities and overlooks how political parties serve as mechanisms of forging alliances between groups. As I argue in Chapter 4, the ruling bloc represented by the KMT included not just Mainlander and native elites, but crucially tied these groups to various subaltern classes including workers at large state enterprises, farmers, Aborigines, and military personnel. The opposition party which emerged in the 1980s, the DPP, was initially more directly associated with the interests of local elites, but it too grew to incorporate a diverse alliance of various interests, including a broad array of identity-based movements, including feminists, environmentalists, teachers, as well as Hoklo, Hakka, and Aborigine rights advocates. The DPP came to power voicing the dissatisfaction of these groups, but

their inability to adopt a class based politics forced them to articulate their concerns in terms of national identity. The nativist elite within the KMT was able to appropriate the nativism of the DPP by promoting a multiculturalist discourse. For this reason I disagree with Wu's assessment regarding the significance of the recent rise of the DPP from an outlawed party to its current status as the ruling party.

Wu's mistake is to assume that the rise to power of the DPP is as much a success for the nativist faction within the KMT as it is for those in the DPP.

Ideologically speaking, the victory of Chen Shi-bian, the quintessential native son of Taiwan, in the presidential election of 2000 extends the rule of the very native KMT-DPP historical bloc that emerged during Lee's reign, even though the power relation between the two partners has now been reversed (Wu, 2002: 212-13).

Wu, drawing on Chatterjee's reading of Gramsci (Chatterjee, 1986), argues that there was a passive revolution because the DPP rose to power through a *war of movement* as opposed to a *war of position* (Wu, 2002: 201). I believe Chaterjee makes too much of strategy. A change in the ruling historical bloc constitutes a passive revolution because of the failure of this new historical-bloc to produce a genuinely national-popular ideology. Gramsci saw this failure as deriving from the different forms of political alliances he saw in various European revolutions, but he did not equate passive revolution with a specific revolutionary strategy. In fact, Gramsci's argument was precisely that different strategies were necessitated by different state formations (Anderson, 1977: 28).

Has there been a passive revolution in Taiwan? In the sense that a new concept of identity has emerged which allows the native elite to gain a foothold in the traditional power structures, the answer is "yes"; however, it would be a mistake to assume that a

stable historical bloc has emerged out of this. The two sides are still very much competing for control. The continued appeal of older forms of national identity, the lack of an alliance between the nativist elite and subaltern groups, such as workers and Aborigines, is apparent in the new ideology of national identity.

What is the new ideology of identity negotiated between Taiwan's competing historical blocs? It is *multiculturalism*, but not American style multiculturalism; rather, it is a specific form of multiculturalism imported from Japan (Lu, 2002), one in which identity is defined in terms of one's "local" community, rather than ethnicity (although the de-facto ethnic segregation of Taiwan's rural landscape makes one a useful stand-in for the other). Viewed in terms of Slavoj Žižek's theory of multiculturalism as "the cultural logic of multinational capitalism" (Žižek, 1997), the pantheistic respect for the uniqueness of local cultures embodied by multiculturalist ideology serves to mask the monotheism of the global marketplace. It is the embrace of this location-based multiculturalism that is the hegemonic ideology of Taiwan's current standoff between two competing historical blocs. What Žižek's view of multiculturalism as a by-product of globalization misses, however, is the role played by individual nation-states in shaping the specific form of multiculturalism. The Japanese form of multiculturalism adopted in Taiwan needs to be understood in light of the specific historical processes by which the Taiwanese state came to adopt multiculturalist ideology.

In this chapter I lay out the immediate causes that led to the adoption of the ideology by which Taiwanese identity is seen as but one level in a series of concentric circles radiating out from the local level. First, I explore Taiwan's ethnic and linguistic

makeup. Secondly, I identify the immediate antecedents of the adoption of the new ideology as the basis for the primary school curriculum. Then I explore the nature of those changes, first in the 1994 revised history curriculum, followed by the new integrated curriculum for primary and middle school implemented in 2001. Finally, I focus on the linguistic implications of the new curriculum, relating them to the ideology of localism.

Taiwan's Language Situation

Before the arrival of the Japanese in 1895, the official language of the Qing bureaucracy was what is commonly referred to as Classical Chinese 文言文 (*wényánwén*). It was primarily a written language, which was pronounced differently in each region of the Empire. During the reign of the Yong Zheng 雍正 (*Yōng Zhèng*) Emperor¹ there was an attempt to unify pronunciation with the establishment of Pronunciation Correcting Academies 正音書院 (*zhèngyīn shūyuàn*) in 1729 (Lee, 1995: 134). But the effort was short-lived. The Taipei academy closed its doors in 1750 (1995: 134). The Mandarin Chinese that became official after the KMT succeeded the Japanese (1895-1945) is quite different from this classical language. Mandarin is based on the vernacular lingua-franca spoken by Ming and Qing era bureaucrats, Guanhua 官話 (*guānhuà*) (Heylen, 2001: 43). While initially based on the vernacular spoken in the old Chinese capital of Nanjing, Mandarin changed, acquiring local characteristics, when the capital was moved north to Beijing at the start of the fifteenth century (2001: 94-99). This is important because even those few Taiwanese literati who became bureaucrats during the late Qing were unlikely

to have had much exposure to spoken Mandarin, knowing only the written Classical Chinese which they pronounced in their own vernacular (2001: 97). When Mandarin was imposed as the official language by the KMT, it was an alien language, although it was already widely in use as the lingua franca of the over two million soldiers, KMT officials, and other Mainlanders who came to Taiwan at that time.

The languages spoken in Taiwan before the arrival of the Japanese fall into two language families: Chinese and Austronesian. Initially there were three local Chinese languages, deriving from the various regions of southern China from which settlers had come in the fifteenth and sixteenth centuries. By the end of the nineteenth century, as ethnic feuding between settlers from Zhangzhou 漳州 (*Zhāngzhōu*) and Quanzhou 泉州 (*Quánzhōu*) settlers subsided (see Chapter 3), the differences between the two varieties of Hoklo accordingly became less important. Today the language resulting from this merger is the mother tongue of seventy-three percent of Taiwan's population. The other Chinese language native to Taiwan is Hakka. The Hakka are a Chinese minority ethnic group. Having purportedly migrated to Guangzhou 廣州 (*Guǎngzhōu*) from Northern China during the Song Dynasty (960-1279), they found a niche in the sparsely populated mountainous regions of the south, living in close proximity with the She 畚族 (*shēzú*) Aboriginal group, from whom they adopted many economic and social practices. The language seems to have been adopted from the local southern population as well (Leong, 1997: 4, introduction). The Hakka came to Taiwan around the same time as the Hoklo-speaking Chinese, and today account for about fifteen percent of the population (Government Information Office, 2003c).

The other language family in Taiwan consists of the Austronesian languages. These are, in turn, divided between the majority, which are classified as Formosan Austronesian languages and Yami 雅美族 (*Yǎměizú*), which is classified as Malayo-Polynesian Austronesian (the Yami are believed to have migrated to Taiwan from the Philippines). Genocide, assimilation, intermarriage, and forced relocation have all contributed to the loss of a significant number of Taiwan's Austronesian languages. There were 24 Austronesian languages spoken during the Dutch colonial era (1624-1662), and of these, there were 17 still spoken at the end of World War II, according to Japanese records (Huteson, personal communication, 2003). Altogether, Taiwan's Austronesian population, which uses the term "Aborigine" 原住民 (*Yuánzhùmín*) to refer to themselves, is made up of only 433,689 people, accounting for 1.7 percent of the island's population (Chiung, 1999: 3). The government officially recognizes twelve Aborigine ethnic groups. The chart below is from the government's 2003 yearbook, and shows only eleven of these twelve, since the Truku 太魯閣族 (*Tàilǔgézú*) Aborigine ethnic group was only recognized as distinct from the larger Atayal 泰雅族 (*Tàiyǎzú*) population in July of 2004 (Government Information Office, 2003a; Ko, 2003).

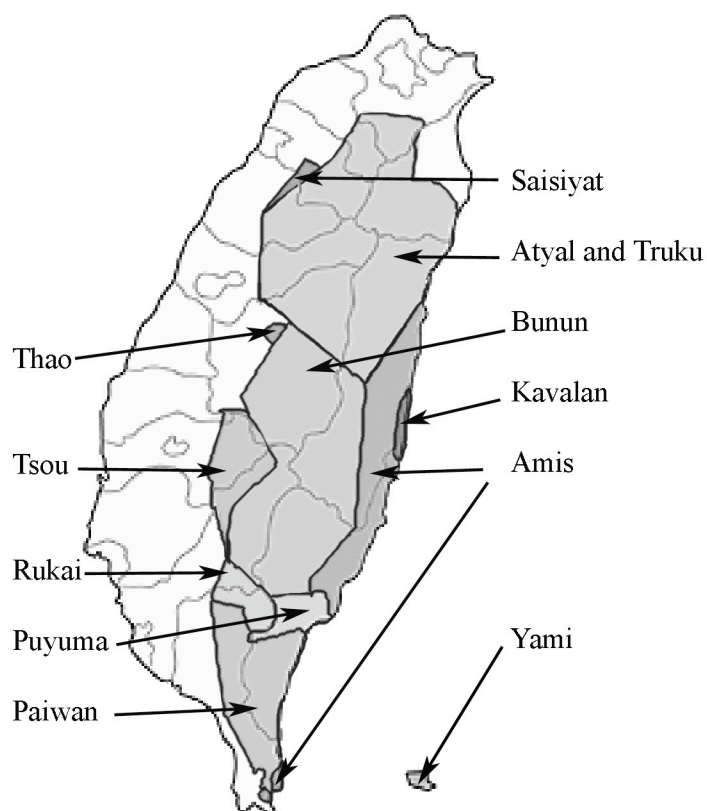


Figure 1: Distribution of Taiwan's Aborigine Ethnic Groups²

Today, there are only ten Austronesian languages with populations of more than a hundred speakers. Kavalan 噶瑪蘭族 (*Gámǎlánzú*), Thao 邵族 (*Shàozú*), Pazeh, Saaroa 湘西苗族 (*Xiāngxīmiáozú*), and Kanakanavu 卡那卡那富族 (*Kǎnàkǎnfùzú*)

have between one and ten living speakers each (of these, only Kavalan and Thao are recognized as distinct Aborigine ethnic groups by the government).

Table 1: Estimated Number of Speakers of Living Austronesian Languages in Taiwan

Language	Total Pop. (2004) ³	# speakers (low) ⁴	# speakers (high) ⁵
Amis (阿美族)	166,608	28,323	130,000
Atyal (泰雅族)	88,025	14,964	63,000
Paiwan (排灣族)	78,346	13,318	53,000
Bunun (布農族)	45,979	7,816	34,000
Truku (太魯閣族) ⁶	15,359	2,611	28,000
Rukai (魯凱族)	11,213	2,100	8,000
Puyuma (卑南族)	9,900	1,683	7,225
Tsou (鄒族)	5,798	350 (986)	3,000
Saisiyat (賽夏族)	5,457	500 (928)	3,200
Yami (雅美族) ⁷	3,248	552	5,000

Survey data based on Aborigine college students suggests a language attrition rate of “15.8 percent over two generations, and 31 percent over three generations” (Tsao, 2001). While neither is in threatened with language death in quite the same way as the Austronesian languages are, Hakka and Hoklo are also in decline, with the situation being much more serious for Hakka than Hoklo:

The Hakka students performance was only slightly better than that of the aborigines, with 40 percent of the students surveyed saying that Hakka is the most frequently used language at home. Elsewhere, according to

Huang's 1993 survey of 327 Hakka students in the Taipei area and 404 Hakka Taipei citizens, only 70 percent of those whose parents are both Hakka speakers claim that they can speak Hakka (2001).

While Hoklo is not declining as quickly, recent surveys continue to show a decline in Mother Tongue proficiency (2001). For all of the languages, it is far too early to tell if any of the current linguistic reforms, discussed below, will do anything to reverse their decline. In order to understand this decline, it is necessary to look back at the process by which the value of local languages in the linguistic marketplace was undermined during both the Japanese colonial era and the early years of KMT rule.

The Defining Moment

In 1990 KMT President Lee Teng-hui invited a hundred and fifty of “Taiwan’s leading lights,” including academics and business leaders as well as politicians from across the political spectrum, to discuss the future of such important topics as: “the local government system, the central government system, constitutional revision and mainland China policy” (Rigger, 1999: 151-52). No other moment so clearly defines the end of the ruling historical bloc which had first been established during the Japanese colonial era and solidified under KMT martial law as the 1990 National Affairs Conference 國事會 (NAC, *guóshìhuì*). As I have argued (see Chapter 4), political economic factors under both the Japanese and the KMT had always made it difficult for the ruling bloc to exert its hegemony over the island’s local elites. At the same time, I have argued that the legitimacy of the KMT was based on more than just coercion; that a system of alliances and incentives served to secure the consent of at least some sectors of society, tying them

together to the ruling party in a historical bloc. The foundation of this system, including the school system, local elections, farmers associations, ethnic division, linguistic and cultural nationalism, etc., had already been established during the Japanese period, and were adopted wholesale by the KMT after the shock of the February 1947 uprising. The announcement of the NAC made it clear that every aspect of this system was now open to change, and just a week before the conference had begun, on June 21, 1990, the Council of Grand Justices responded to a joint resolution brought by KMT and opposition Democratic Progressive Party 民主進步黨 (DPP, *Mínzhǔ Jìnbùdǎng*) party members by announcing that “all life-tenure members of the Legislative Yuan, Control Yuan and National Assembly” would have to step down by the end of the following year (1999: 152).

All this had been a long time in coming. Martial Law had ended in 1987, and in May of 1990 Lee Teng-hui announced that he would “abolish the Temporary Provisions, the source of his extra-constitutional powers, a year hence” (1999: 152). Pressures for reform had been increasing from a variety of both internal and external sources. While the Korean War (1950-53) had served to bolster U.S. support for Taiwan, the official recognition of the People’s Republic of China 中華人民共和國 (PRC, *Zhōnghuá Rénmín Gònghéguó*, also “mainland China”) by President Carter in 1978 created a political crisis for the KMT, who could no longer claim to be the true political representatives of China, and cast serious doubt on their ambitions to one day retake the mainland. The life-tenure members of the Republic of China 中華民國 (ROC, *Zhōnghuá Mínguó*) government who were ordered to step down at the end of 1991 were supposed to

represent each of the provinces of Mainland China. Because the ROC had not been able to hold elections in these provinces since retreating to Taiwan, many of these members had been in office since before 1945 and were already quite old.

There were other pressures for reform as well. Taiwan had had a Green Revolution under the Japanese, but KMT land reforms (see Chapter 4) had done little to slow a downturn in agricultural output starting in the late sixties. Rising wages, mixed with slower growth created a serious crisis in the agricultural sector (Amsden, 1979: 374). At the same time, “embarrassed by the apparent successes” of China’s Great Leap Forward 大躍進 (*Dàyuèjìn*), and threatened with a cutoff of aid by the U.S., who were upset with the limits Taiwan’s import-substitution policies placed on free trade, the KMT had to shift over to an export-oriented economy (Gates, 1996: 221; Shiao, 1996: 216). This had the effect, by the 1980s, of shifting the balance of power between the large state-owned enterprises that the KMT had inherited from the Japanese era, to the small and medium-sized enterprises (SMEs) owned by Taiwan’s burgeoning middle class:

In 1958, public and private enterprises contributed equally to the total industrial production value. Since then, private enterprise has been more productive than public firms. (Shiao, 1996: 218-19)

It was Taiwan’s burgeoning middle class who, in the 1980s, encouraged by the thawing of martial law, began to mobilize along identity and issue based New Social Movements.

At least seventeen such movements had emerged by the end of 1988:

Their claims were varied, but we can delineate the following types: 1) Grievances against the state's inaction when confronted by problems, with new demands for consumer protection, pollution control, and ecological conservation. 2) Protests against state policies regarding ethnic groups and minorities' language rights, land control, and cultural identity and preservation. Protests have also arisen against inadequate policies in

caring for disadvantaged groups such as the elderly, the handicapped, and veterans and even the treatment of certain religious groups. 3) Challenges to the state's corporatist mode of control over key social groups such as workers, farmers, students, women, and teachers and intellectuals. 4) Demands to change the established rules governing politically sensitive issues such as the ban on contacts between the peoples of Taiwan and the Mainland, and the human rights of political victims. (Hsiao, 1990: 166)

The political voice of these heterogeneous social movements was the newly legal opposition political party, the DPP, who had had unprecedented success in the 1989 elections, both in the Legislative Yuan, where they captured 30% of the seats, as well in municipal elections, where they secured six important victories (Rigger, 1999: 139).⁸ The DPP's core supporters were owners of SMEs, who opposed the preferential treatment the KMT awarded to the larger state-owned businesses (Rigger, 2001: 40). Because of this, and because the KMT had "worked to secure a base of support in all socioeconomic classes," either through favoritism, or through "patronage and pork barrel projects," (2001: 40), the DPP could not easily engage in a class-based politics. Instead, they focused primarily on non-economic issues, especially the identity and issue based politics of the new social movements (2001: 40).

This was the context in which the NAC met in 1990. It was an outright attempt on the part of the KMT to appropriate the core issues of identity politics and democracy, which had catapulted the DPP onto the national stage the year before. I have argued (see Chapter 2) that hegemony must be understood not simply as the ascent an ideology that reflects the interests of the ruling class, but as the result of the political processes by which the interests of both ruling and subaltern classes come together to form a historical bloc. What happened at the NAC was no less than the moment of conception of a new

Taiwanese hegemony in which the political base represented by the DPP, together with the newly powerful local Taiwanese leadership of the KMT (more about them later), joined together to lay the groundwork for both a new institutional relationship and a new ideology which would serve to legitimate that relationship. Gramsci used the term “passive revolution” to capture this kind of revolution “from above” in which a new hegemony is established without disturbing the underlying social relations (Gramsci et al., 1972: 107-120, 321).

The ideology that would legitimate the new historical bloc was first developed by a committee put together (at the 1990 NAC) to develop educational reforms. The old conception of ethnicity in which all local differences were subordinated to a greater Chinese identity was to be replaced with a more pluralistic conception of “concentric circles,” 同心圓 (*tóngxīnyuán*) (Corcuff, 2002: 87). This concept of Taiwanese identity as a series of concentric circles, and how it would apply to the new curriculum, was most clearly articulated in 1996 by Kuo Wei-fan, a Taiwan-born KMT leader, during an “inner meeting of the ruling KMT”:

If we look at things from the point of view of the textbook structure, a student book must start learning from the immediate environment, then extend the scope step by step to local culture and the main ethnic groups of the society, extending it then to the knowledge of the culture of all ethnic groups that compose the territory and the nation. Only then can one understand the worlds' culture. Consequently, primary and secondary programs are being reformed following a strategy consisting of standing on Taiwan, having consideration for China, opening eyes on the world (2002: 87).

This new conception of Taiwanese identity grounded in the “local” was a unique form of multiculturalism imported from Japan. Not coincidentally, the same year that the

educational reforms were finally announced (1994) was also the year that a program of sponsoring culture-building at the community level was announced by the government. The Integrated Community-Making Program 社區總體營造計畫 (*shèqū zǒngtǐ yíngzào jìhuà*) was a state-sponsored program which, like the pluralistic notion of concentric-circles, aimed to undo the damage of the previous era, which had sought to stamp out local differences in the name of national unity.

Following its implementation local organizations [在地團體 (*zàidì tuántǐ*)], including community associations, cultural and historical societies, cultural foundations, and so on, flourished in virtually every corner of the island. Wittingly or unwittingly, their works became a collaborative engineering of "local differences" within the national scope. (Lu, 2002: 18).

Slavoj Žižek's calls multiculturalism "the cultural logic of multinational capitalism" (Žižek, 1997), but it is not enough to argue that Taiwan's integration into the global marketplace allows these local traditions to flourish, for this would be to skip over the crucial political processes by which the emergence of multiculturalism is mediated through the political processes of negotiation and alliance formation. It is true that the same forces which have pushed Taiwan into the global marketplace have also been the same ones which strengthened the power of the SME business owners who are the DPP's base, but it is likely that given free reign the DPP would have sought to replace the Chinese nationalism of the KMT with a new Taiwanese nationalism grounded in the majority Hoklo culture, instead of adopting a more tolerant and nuanced policy of multiculturalism and localization. This latter policy must be seen as a compromise, imposed of political necessity. As we will see, it is a compromise that remains inherently unstable.

Language, Localization, and Identity

Rewriting History

Electoral democracy, the rise of identity-based politics, and the decline of the centralized control over the historical ruling bloc all conspired to force the KMT to meet the opposition half-way in an effort to forge a new ideology which could appease the newly powerful local elites without leading to a wholesale abandonment of the KMT's hegemony. Nowhere is this new ideology more apparent than in the changes to the national curriculum, and the new history textbooks. The universalistic Chinese vision of nationhood (Duara, 1993) that had been the basis of the old curriculum was abandoned in favor of a more flexible "multi-leveled" conception of Taiwanese national identity (Hughes and Stone, 1999). This new conception of identity was articulated as a series of concentric circles, with a newly formed "local" culture at its core. Localism has the advantage of not explicitly favoring one ethnicity over another, even if the fact that Hoklo language and culture is dominant in most of Taiwan's "local" cultures can be expected to give it a *de facto* advantage.

The transition from Chinese universalism to localism can be broken down into three eras: "those of 'traditional Social Studies education' (1950–1980), 'new social studies education' (1980–2000) and '9-year integrated social studies' (2001–present)" (Liu and Hung, 2002: 572). During the traditional era the middle school social studies curriculum only mentioned Taiwan "at the very end of a grand narrative on the development of the Chinese nation from the stone age to the present" (Hughes and Stone,

1999: 982). Taiwanese frequently complain that they learned the names of every railway station on the Mainland, but did not even learn the first thing about their own history. The textbooks taught that all of Taiwan's ethnic groups were essentially Chinese:

the 1975 textbooks still stress that the aborigines, along with all other 'Chinese' ethnic groups, have acquired a common ethnicity after 5000 years of 'assimilation' [融合 (*rónghé*)]. The textbooks indoctrinated students into the belief that the people of Taiwan all belong to the same 'Chinese' ethnic group. (Liu and Hung, 2002: 582)

In 1994, Lee Teng-hui introduced the new middle school social science textbooks, *Know Taiwan* 認識台灣 (*rènshi Táiwān*). In Lee's own words these new textbooks were intended to consolidate and promote "a Taiwan Gemeinschaft [生命共同體 (*shēngmìng gòngtóngtǐ*)], a term that is central to Lee Teng-hui's thinking on the relationship between Taiwanese and Chinese identity" (Hughes and Stone, 1999: 987). The notion of ethnicity embodied in the new textbooks was radically different:

the Society volume has a whole sub-chapter under the title "We are all Taiwanese" [我們都是台灣人 (*Wǒmen dōu shì Táiwānrén*)]. It also departs from the established categorization of those who can trace their origins to Fujian or to Hakka ancestry as belonging to the Han ethnic group, by dividing the population into the four ethnic groups [Hoklo, Hakka, Mainlanders, and Aborigines]. (1999: 986)

At the same time as the middle school social science textbooks were revised, a new course was introduced into the primary school curriculum, starting in 3rd Grade. The Native Place Teaching Activities (NPTA) sought to integrate the "study of students' local living environment" and each county was expected "edit and publish its own textbooks for NPTA" (Liu and Hung, 2002: 573). These were similar to the new middle school books in purpose, but focused even more specifically on the local region. Unfortunately,

these textbooks were written at a level far above that of most of the students for which they were intended. Lu Hsin-yi offers two good explanations of why these books were so difficult: the first being that they were written by university professors who knew little about primary education; the second was that “the course content was mostly new to the school teachers” themselves (Lu, 2002: 51). My own fieldwork confirms Lu’s observations. The NPTA textbooks for Hualian County were still in use when I arrived at Fountainhead Primary. The texts were far beyond the reading level of most of the primary school students. When I asked the school’s principal about the suitability of the textbooks she replied: “We didn’t write them.”

The third period of educational reform coincides with the rise to power of Taiwan’s first opposition party president, Chen Shui-bien 陳水扁 (*Chén Shuǐbiǎn*), but the policy is one that was already under development during the last years of Lee Teng-hui’s rule. In 1968, in his “Memo on Educational Reform” «革新教育注意事項» (*Géxīn jiàoyù zhùyì shìxiàng*), President Chiang Kai-shek had centralized and unified the production of Taiwan’s textbooks and curriculum standards (Lu, 2002: 47). This remained the state of affairs until 1996, when private companies were allowed to publish books as well, although they needed to be approved by the MOE before they could be used (Liu and Hung: 572). The new 9-year Integrated Curriculum Plan for Elementary and Junior High Schools 九年一貫 (*jiǔnián yíguàn*, henceforth referred to as the 9-year Curriculum), however, seeks to decentralize the education system, giving much greater power to regional Education ministries, schools, and especially to classroom teachers.

This curriculum plan is widely regarded as a turning point for curriculum decentralization because it involves the replacement of the previous curriculum standards by non-prescriptive curriculum guidelines, while the centralized and prescriptive national curriculum will be replaced by school-based curricula (Liu and Hung, 2002: 574).

These changes are not all entirely welcomed by the teachers themselves. More responsibility means more work. There is a general feeling I observed amongst schoolteachers and parents that curriculum reforms served political agendas, not the needs of students and teachers.

The move towards decentralization is in many ways a continuation of Lee Teng-hui's localization program as it was initially envisioned. At the same time, it is also a strategy to deflect the criticism and controversy raised by the first stage of curriculum reform in the 90s. Which were accused of being "full of ideology and political motivation," and were associated with the movement for Taiwanese independence (Lu, 2002: 50). By focusing on local communities rather than the nation as a whole, the new curriculum is able to appear less politicized. The holistic approach of the new 9-year Curriculum calls for teachers and schools to find their own ways to integrate the "special characteristics" 特性 (*tèxìng*) of their own community into the curriculum. This effectively extends the goals of localization while attempting to insulate the national government from debates about curriculum ideology.

The 9-Year Curriculum

The new curriculum's name derives from the fact that it seeks to integrate all nine years of compulsory education into a single developmental program. Previously, the six years

of primary school and the three years of middle school were considered separately. This division was further highlighted by the taking of a national exam at the end of primary school that determined which middle school a child would attend. Another exam at the end of middle school was similarly important for determining high school placement, dividing students between those who would go to vocational college and those who would go on to high school and (hopefully) university. However, as Taiwan's middle class has expanded, so too have the educational aspirations of the population. In addition to the reforms included in the 9-year Curriculum (discussed below), there has been a tremendous expansion in the number of colleges and universities, both public and private. In 1988 there were 496,530 college students in Taiwan, by 2003 that number had gone up to 1,270,194 (Government Information Office, 2004).

Although still constantly being revised in response to parents and teacher's concerns, central to the entire reform process are efforts to reduce the importance of the Joint College Entrance Exams 大學聯考 (JCEE, *dàxué liánkǎo*), taken at the end of high school. These exams have been criticized for the "washback effect" they have upon the entire educational process (Lii-Shih, 1994). The entire curriculum is geared towards teaching for the exams. This results in the emphasis of easily memorizable and testable facts over basic skills and ideas. In language education it encourages grammar and translation approaches over those that emphasize communicative competence (Lii-Shih, 2002). Although students can still take the exams that mark each transition in the educational process, they can now also use other methods, such as applying directly to

their school of choice (as is the norm in the United States), as well as a third option of Selection by Recommendation 推薦甄選 (*tuījiànzhēnxuǎn*).

The selection by recommendation method calls for recommendations by senior high schools on the student's behalf. Each senior high school will have a quota of students they can recommend. (Government Information Office, 2003b)

Students opting to use alternative methods of advancement will still have to take tests, but these differ from the JCEE in emphasizing the testing of skills over information. Accordingly, the new 9-year Curriculum seeks to expand the ways in which students are evaluated, as well as the content of the curriculum itself.

It is not surprising that many of the new educational reforms reflect the thinking of educational reformers in the United States, as many of the people leading the reform process, indeed many of Taiwan's leaders, have been educated in the United States. Central to these changes is a shift from subject based teaching (i.e. math, history, social science, etc.) to an interdisciplinary program that focuses on "basic skills" (Liu and Hung, 2002: 574). A concrete example of what this might mean was provided by a first grade teacher at a school meeting: Each week there might be a "theme" which unifies class activities. One such theme might be "summer." Students would learn science by studying butterflies and summer ecology, they would learn math by counting butterflies, or estimating their population, etc. and they would learn social science by studying activities that traditionally happen in the community during the summer (field notes, March 7, 2001). The weekly schedule would reflect these changes, no longer being divided up into set time slots for each subject, but, instead, divided into chunks of time that could be devoted to exploring a concept fully. For instance, a full two weeks might be devoted to

trying to explore a math problem from different angles, if the teacher felt that to be appropriate (field notes, March 7, 2001). Linked to this holistic approach is an attempt to tie classroom activity more closely to the community. Decentralization and localization are thus tied together in both the content and the process of creating the new curriculum.

Localization and Cultural Consumption

The clearest example of cultural policy functioning as a form of corruption, in the Gramscian sense (see Chapter 2), comes from Lu Hsin-yi's work on the creation of local culture in Taiwan (Lu, 2002). Drawing on Lu's work, I argue that localization should be seen as a means by which local elites are co-opted by the state. In doing so I do not intend to disparage the place-based social movements that gave rise to Taiwan's localization policies; rather, I simply examine the ways in which the demands of cultural activists have been appropriated by the state.⁹ Lu makes clear that cultural research was used by the KMT (and, I would add, the Japanese before them) as a means to incorporate local elites into the state as early as 1948, just a year after the February 28th incident. For thirty years, from 1950 to 1980, most of the historical research on Taiwan's local history was conducted at the Taiwan Provincial Archive Center 台灣文獻委員會 (*Táiwān wénxiàn wěiyuánhui*), which was established in 1948. The center has been described as "an easy workplace with almost no political significance" other than providing jobs for the local elite (Lu, 2002:52).

Even post-reform era cultural construction, such as the famous indigenization efforts of Ilan county's government and its successors, while originated in opposition to

the central government, were still far from “grassroots” mobilizations. If anything, they seemed to be a means of attracting back educated locals who had left their villages to seek better paying careers in Taipei.

Most of my cultural-worker friends in Ilan were newcomers or return migrants from Taipei. Some of them were successful professionals in Taipei, tired of living an uprooted life style and delighted to have a chance to come home without having to settle for unskilled jobs as did their parents' generation. Their experiences of return were not all positive, however. Some of them soon realized that Ilan's cultural construction was based on political maneuvering and did not really emerge from the "grassroots." Once the political wind changed direction, the policy would soon collapse. (2002: 103)

Allen Chun traces the emergence of local cultural production to the establishment of a Committee for Cultural Reconstruction 文化建設委員會 (*Wénhuà jiànshè wèiyuánhui*, now known in English as the Council for Cultural Affairs) in 1981 (Chun, 1994: 65). Cultural Reconstruction replaced the Cultural Renaissance movement 文化復興運動 (*wénhuà fùxīng yùndòng*) which had been inaugurated by Chiang Kai-shek in 1967, in response to the Cultural Revolution 文化大革命 (*wénhuà dàgémìng*) on the mainland (1994: 57). Chun argues that the political use of culture to shore up Chinese nationalism in Taiwan “was simply the first step in a long-term process to objectify (and 'commodify') culture” (1994: 58), paving the way for the culture-as-commodity approach implicit in the localization of the reform era. However, unlike the Cultural Renaissance movement,

cultural reconstruction was meant to be explicitly 'non-political' in orientation and as such regularly sponsored cultural interchange of various sorts. Cultural centres [文化中心 (*wénhuà zhōngxīn*)] were set up in each township to organize and promote cultural activities. They were responsible not only for cultivating the broader view of Chinese tradition

but also for promoting interest in and preservation of local traditions of culture during this era of reconstruction coincided with the development of 'the culture industry' in Taiwan in other regards - e.g., tourism, media commercialization, public festivals and popular arts. (1994: 65-66)

Concepts of leisure and tourism were widely promoted as a sign of Taiwan's progress and prosperity (Harrell, 1994).

Lu's study provides us with a detailed look at the production of local culture in the town of Baimi, now famous for its wooden clogs. These wooden clogs, known as *muji* 木屐 (*mùjī*), were introduced to Taiwan during the Japanese era, but Baimi was only a center of *muji* production from 1955 to 1961 when a craftsman setup shop there (Lu, 2002: 121). As Lu shows, Baimi's fame for its *muji* production was entirely manufactured through the collaboration of the central government, local cultural workers, and the media; all eager to glorify local culture. The choice of *muji* as the cultural symbol of Baimi was entirely arbitrary; it could easily have been an old cement factory, the decision being made by a local committee (2002: 117).

Lu refers to *muji* as an example of "spectacle consumerism" or "making something for display," which she says is a "basic requirement to obtain and renew government funding" (2002: 123). In 1997, Baimi received two million NT dollars to promote *muji* manufacture, money that was used to create an exhibition hall and a studio (2002: 121). Lu is skeptical of claims that the newly founded *muji* industry is able to sustain itself through tourist revenue, reporting that in 1998 and 1999, "at least one third of the clogs were distributed through governmental promotion" (2002: 127). Overall, Baimi received "over ten million NT," about US\$30,000, "to develop its unprofitable

wooden clog industry,” with most of the money going to “support a unique profession of ‘community planners’” (2002: 164-65).

Throughout my time in Taiwan, I continually observed the modern relics of such spectacle consumerism. Community centers, libraries, museums, etc. all having sprouted up in recent years in order to seize upon government money to promote local culture, but most of these sites were largely empty, locked up and unused.

Learning Native Languages

Until the 90s, Taiwan’s languages had been referred to by the government as “dialects” 方言 (*fāngyán*), with the rise of identity-based politics in the 80s, this began to change and the terms “mother tongue” 母語 (*mǔyǔ*) or “native language” 本土語言 (*běntǔ yǔyán*) began to be used instead (Sandel, 2003: 530). This was part of a concerted effort to sever the association of these languages with “backwardness, vulgarity, ignorance, femininity, aging, and so on” (Hsiau, 1997: 308). These stereotypes were perpetuated by the nature of Hoklo programming on Television and Radio, most of which was targeted at a poorer and more rural audience. The amount of native language programming had also been limited by requirements established in 1976 that Mandarin should account for no less than 55 percent of radio broadcasts and 70 percent of television air time (1997: 308). Ending these restrictions had been one of the aims of the 1988 Return My Mother Tongue protest by Hakka speakers in Taipei. They were finally lifted in May of 1990 (Hsiau, 2000: 133). Native language education was a part of the political platform of the

DPP in the 1989 elections, in which a number of DPP candidates swept into power in mayoral and county magistrate elections (Hsiau, 1997: 311; Sandel, 2003: 530).

Behind these political movements was an intellectual movement for nativist literature that had begun in the 1960s, but which had roots in the nativist literary experiments during the Japanese era (see Chapter 4). During the 1950s any kind of social realism was considered suspect by the anti-Communist KMT, who favored modernism and tended to ignore rural issues (Bain, 1993: 96). Moreover, because of the potentially fatal consequence of writing in Hoklo, and the limited Mandarin proficiency in Mandarin on the part of most of the native elite, most of the writers in the early post-war years were Mainlanders (Hsiau, 2000: 80). In the 1960s a new generation of writers began to question the “Westernism” of contemporary literature by writing stories set in rural Taiwan, idealizing the Taiwanese farmer as a bastion of traditional values under attack by modernization (Bain, 1993: 97). This new Hsiangtu 鄉土 (*xiāngtǔ*) literature was highly controversial and was attacked for provoking class divisions (1993: 104). In the 1970s this took on stronger political overtones when the writing was renamed the Bentu 本土 (*běntǔ*) literature by members of the *Li* poetry society, emphasizing the unique history of Taiwan as opposed to Mainland China (Hsiau, 2000: 86).

Few of the nativist literature writers used the local vernaculars, but wrote in Mandarin instead. One exception was the poet Lin Tsung-yuan 林宗源 (*Lín Zōngyuán*) who used Hoklo “phrases and syntax” in Mandarin poems written during the 1960s, and then began writing in “pure Hoklo” in the 1970s (2000: 136). In 1984 a Taiwanese

historian residing in Japan wrote an essay in a Taiwanese journal “on the relationship between the Taiwanese language and Taiwanese literature” (2000: 136); but it was not until 1987 that a Taiwanese writer openly advocated creating a modern Hoklo literature. This was Sung Tse-lai’s 宋澤萊 (*Sòng Zélái*) essay “On the Issue of Writing in Hoklo” 談台語文字化問題 (*Tán Táiyǔ wénzìhuà wèntí*) (2000: 137). As there had been during the Japanese era, a debate ensued about whether or not a Hoklo literature should be written in Chinese characters or entirely in phonetic script, this debate still rages today, but “for the past decade, a mixture of these two writing forms has been the most popular way to write Hoklo” (2000: 138).

During this time the use of local languages in political speeches become more and more common. In 1987

A prominent DPP member of the Legislative Yuan, Chu Kao-chen, used Hoklo instead of Mandarin to address a session in March. As a defiant legislator of the newly-established opposition party, Chu deliberately spoke Hoklo to embarrass KMT Mainlander cabinet officials and old permanent legislators. Chu's challenge exposed the fact that Mainlander political elite could not understand and were unwilling to learn the major local language, though they had lived on the island for nearly forty years. (2000: 132)

Since that time, speaking local languages has become essential for political success on the national stage in Taiwan. Prominent Mainland politicians, such as Taipei Mayor Ma Ying-jeou 馬英九 (*Mǎ Yīngjiǔ*), and presidential hopeful James Soong 宋楚瑜 (*Sòng Chǔyú*), have made a public show of their own efforts to study Hoklo. I once saw a T.V. show in which Ma Ying-jiu was practicing his Hoklo with people on the street in Taipei,

and the books used by James Soong to study Hoklo became best sellers. Code-switching into local languages has also become de-rigueur (Chen, 2003: 116-17; Lii-Shih, 1998).

There were a total of six municipalities that sought to implement native language education¹⁰ after the 1989 elections (Hsiau, 2000: 138), the most famous being Ilan, Kaohsiung, and Taipei. Because of the rigidity of the national curriculum at this time, mother tongue classes, as well as teaching local history, was introduced during periods usually reserved for electives. This meant that only an hour or two a week were spent on language education, and that the time would often be missed altogether when pressure from exams or other events caused the electives to be canceled. On top of this, limited budgets, poorly trained teachers, and inadequate teaching materials made these early efforts quite limited (2000: 133). And when the political fortunes of the DPP changed in those municipalities, the native language curriculum was often the first casualty.

Native language education finally became a part of the national curriculum with the announcement of the 9-year Curriculum in 1999. The program was to be phased in slowly, starting with the first grade in 2001, second and third grade in 2002, and all of middle school the following year (Sandel, 2003: 530). Which languages would be taught would depend on the ethnic composition of the local community. The number of hours remained small, still only an hour or two a week. Because the 9-year Curriculum's schedule is more flexible, the fact that these courses are no longer "elective" does little to ensure that they would always be taught. The opening up of text book publishing means that there is tremendous competition amongst private publishers to produce new materials for these courses, but the quality is often questionable. The situation is better for Hoklo,

which is now widely heard in the mainstream media, but for Taiwan's minority languages, especially Austronesian languages, there is still a dearth of reading material and even popular culture. Despite the fact that so many Aborigines are successful pop-music personalities, very few of them sing in Austronesian languages. Recently a group organized a competition with the hopes of rectifying the situation (Hsueh, 2004). For many Aborigines, once they gain literacy the only texts they can read in their mother tongue are religious texts provided by the Church. There are programs underway to train teachers, with the goal of only having certified teachers teaching native languages; however, in the meantime schools must rely upon native speakers either among the faculty or within the local community. Because of the limited number of hours, poor materials, and inadequately trained teachers, only communities which already have strong speech communities in the native language are likely to be able to adequately teach the language in the schools. But one of the biggest challenges faced by native language educators is the fact that they must compete with the simultaneous introduction of English education into the primary school curriculum.

Conclusion

I started this chapter by arguing that the emergence of a new ideology in which Taiwanese identity is seen as a series of concentric circles radiating outward from the local level can only be understood as the result of a passive revolution engineered by the native elite within the KMT, simultaneously overthrowing official Chinese nationalism, and avoiding the threat of an emergent Taiwanese nationalism which sought to replace it.

I then laid out the basics of this new multicultural ideology, and explored its effect on Taiwan's language markets. What is missing is the history of ethnic and class formation which shaped the current situation. In order to fully understand the new ideology as a form of passive revolution, it is necessary to first fully understand the nature of the historical bloc which this revolution overthrew, as well as the sources of social power which gave the native elite sufficient leverage to enact this transformation, but not enough leverage to impose Taiwanese nationalism. In the following two chapters I lay out this history, starting, in Chapter 3, with the initial emergence of a native elite in the eighteenth and nineteenth centuries, followed, in Chapter 4, by the transformations that took place under Japanese colonial rule (1895-1945), and during the early years of KMT rule (1945-1987). I argue that the historical bloc which took place during the very end of the Qing era, in the 1890s, and was solidified and expanded under the Japanese. When the KMT took over they adopted not just the institutions of the previous era, but the political economic structure as well. At the same time, it was also in the end of the nineteenth century that a strong and independent rural gentry class began to emerge. Throughout the Japanese and KMT eras attempts to forcibly suppress the aspirations of this class met with failure, leading to concessions, compromise, and greater integration of this class at the end of the Qing, Japanese, and KMT eras. In each era, I use language and education policy as a means of gauging the status, aspirations, and ideology of the various segments of society. Then, in Chapter 5 I look at linguistic globalization, including English language policy and roman orthography for Chinese characters to explore whether globalization might not once and for all change the balance of power.

Notes

¹ Ruled from 1723 to 1735.

² Based on map by Taiwan's Government Information Office (Government Information Office, 2003a).

³ Source: (Council on Indigenous Peoples, 2004b), with the exception of the Truku population which is based on the much larger number listed here (Council on Indigenous Peoples, 2004a).

⁴ With the exception of Saisiyat and Tsou, these numbers are based on the estimated percentage of the population over the age of 50. For Taiwan's Aborigine population as a whole this is 17% (16.59%) (Council on Indigenous Peoples, 2004c). Accordingly, this percentage was used to estimate the number of people over 50 for each ethnic group. The reasoning behind this number comes from Greg Huteson who argues that although some of the younger generation can understand the language of their parents, very few use it (Huteson, personal communication, 2003). While no method is perfect, this seems better than survey data, since self-reported use is notoriously unreliable (Huteson, 2002). The two exceptions are based on communication between Huteson and scholars who have done fieldwork with those populations which suggests that a much smaller percentage of these populations still speaks the language (Huteson, personal communication, 2003). The estimated population is provided in brackets for those two populations.

⁵ The high end estimates are from the Ethnologue database, compiled by the Summer Institute of Linguistics. (Summer Institute of Linguistics, 2004). Many of these are from 1993, which is why the number of speakers sometimes exceeds the 2004 population.

⁶ This group actually includes the Seediq (賽德克族), who see themselves as distinct (Ko, 2003).

⁷ Also known as Tao (達悟族).

⁸ Those six municipalities were Ilan 宜蘭 (*Yílán*), Kaohsiung 高雄 (*Gāoxióng*), Taipei, Pingtung 屏東 (*Píngdōng*), Hsinchu 新竹 (*Xīnzhú*), and Changhwa 彰化 (*Zhānghuà*).

⁹ Lu offers an useful discussion of the debates between critics (such as David Harvey) and proponents (such as Arif Derlik) of place based social movements (Lu, 2002: 20-22). My goal is not to criticize or promote such movements, but to understand their role in shaping Taiwanese nationalist ideology.

¹⁰ This is sometimes referred to as “bilingual education” (Hsiau, 2000; Sandel, 2003), but this is a misnomer. By law, apart from language classes Mandarin is always the medium of instruction. In Taiwan, “bilingual education” usually refers to private schools which teach subjects in both English and Mandarin (see Chapter 5).

CHAPTER 3
TRANSFORMATIONS UNDER THE QING: CLASS FORMATION, ETHNIC
RELATIONS, AND EDUCATION

Introduction

In order to understand the history of education in Taiwan under the Qing, it is necessary to understand it in its historical context: as a source of legitimation for the imperial Chinese state, and the basis for the authority of the gentry. In this chapter I will explore the historical forces that prevented the development of a strong upper gentry in Taiwan and how this hindered the development of traditional Confucian education. In the Chinese heartland, elite held power through corporate control of property by strong clan lineages. In Taiwan, as we will see, the lack of strong kinship networks combined with a tripartite system of landownership worked against the establishment of similar sources of social power. Central to this discussion will be the role of Taiwan's Aborigine population. Not only did Aborigine relations shape Taiwan's land policies, but Aborigines themselves were also the beneficiaries of some of the state's most ambitious education policies. Finally, I will look at the important ways that elite class formation shaped, not only relations between Aborigines and Han immigrants, but also the often-violent relations between different Han ethnic groups. In doing so I hope to provide a portrait, not only of ethnic and class formation at the dawn of Japanese rule, but of the underlying forces which shaped pre-colonial Taiwanese society.

The Origin of the Confucian System in Taiwan

It was not the Qing who first introduced the Confucian examination system to Taiwan. It was their sworn enemy, Zheng Cheng-gong 鄭成功 (*Zhèng Chénggōng*), whose family ruled Taiwan from 1661 till 1683 as a base for their military opposition to the Qing. Zheng was a self-styled Ming loyalist who sought to recapture China from the “foreign” Manchu dynasty. The Ming emperor was still the figurehead of the Confucian system put in place by Zheng, but Zheng himself was their temporary representative till the dynasty was restored (Shepherd, 1993: 96). In 1666, the Zheng regime established a full-fledged examination system, as well as Taiwan’s first Confucian school (Lee, 1995: 32, 97).

The primary target of Zheng’s examination system was its own ruling elite and clan leaders, whose power was legitimated by the exams and associated Confucian rituals. But there was also a proselytizing element, as can be seen from the fact that some Confucian schools were even established in Aborigine villages (one even established by a prominent Ming official who taught Aborigines the art of Chinese medicine), and students were even exempted from corvée labor to encourage their studies (Shepherd, 1993: 103). The importance of Confucian education for the Aborigines was perhaps greater than it was for the Chinese immigrants and soldiers, as the latter were already indoctrinated into the values of the Confucian state, while many Aborigines had been exposed to protestant missionary education during the previous forty years of Dutch rule¹. As Shepherd says, “teaching the Chinese classics to natives who had learned to speak Dutch and to write their own languages in roman script was nevertheless an important step in their sinicization and continued submission to Cheng rule” (1993: 103).

Aborigines greatly outnumbered the Chinese, even with the 70,000 troops that followed the Zheng to Taiwan when he personally arrived in 1670 (1993: 96). But they were hardly a unified force and those living in the Western plains (where the Chinese settled) were subject to Chinese “tax farmers” who competed for the right to levy taxes, a right that also gave them a monopoly over the declining, but still lucrative trade in deer products. These Chinese traders and tax collectors, many of whom may have held a similar position under the Dutch, were a tyrannical lot whose abuse of their tremendous power in the Aborigine villages had been the cause of many an uprising (1993: 14, 77, 115). But the Zheng regime made relatively few incursions into Aborigine land, having been quick to recognize the land claims which Aborigines had established under the Dutch (1993: 97).

Despite his desire to avoid antagonizing the Aborigines, Zheng was also under intense pressure to placate his numerous troops when they were not fighting. Drawn from the ranks of the miserable peasants and fisherman of China’s southeastern coastal regions, their ranks swelled when the Qing ordered the entire population to move inland several miles from the coast behind fortified walls (1993: 96). Zheng’s solution was to establish military colonies on which soldiers were encouraged to farm.² Not until the Nationalists (KMT) would arrive in the wake of World War Two would Taiwan’s political economy be so similarly tooled for war against the mainland. Sugarcane production, which had grown in importance as an export under the Dutch, was cut back in favor of the subsistence production of grain (Ka, 1995: 13). But in 1683 the Qing arrived with an overwhelming force, and put an end to two decades of Zheng rule.

The Settlement of Taiwan

Over the course of two hundred years a steadily increasing immigrant population laid claim to a rapidly diminishing supply of unclaimed land. Only the subjugation of the indigenous population could expand the supply of this precious resource. But doing so threatened the stability of this ill guarded frontier region where foreign powers were known to seek influence and provoke unrest. Moreover, ethnic unrest among the immigrant population made Taiwan's Aborigines useful allies of the state. The state sought a compromise that would encourage the settlement of the island without antagonizing the local population. In doing so, it formed a unique system of land ownership that had the perverse effect of weakening state power in Taiwan and encouraged factional violence.

War had thinned the ranks of Zheng's army, but there were still 40,000 troops remaining on the island when the Qing arrived. All of the defeated soldiers were shipped back home (Shepherd, 1993: 96). Taiwan had seemingly been returned to the Aborigines, but it was only a temporary aberration. "Taiwan's Chinese population increased from about one hundred thousand in 1683 ... to almost two million by 1811. By 1895, this population had risen to nearly three million, although natural increase rather than immigration accounted for much of the later growth" (Lamley, 1981: 292). This massive migration to Taiwan was but one of many migrations (many of which were much larger in scale) caused by the population explosion on the Mainland. "The peace and prosperity following the consolidation of Ch'ing rule resulted in the growth of the Chinese

population from at most 150 million in 1650 to 270 million by 1776” (Shepherd, 1993: 4).

In an effort to control the immigrant population, the Qing vainly attempted to institute legal restrictions. Although a series of policy reversals on allowing or banning immigration entirely seems to have had little effect (Shepherd, 1993: 140-41), the Qing did have more of an impact with their restriction on families, albeit with unintended consequences. By restricting the immigration of families the Qing hoped to do two things: first, keep migration seasonal, forcing the men to return home when the farming season was done, and secondly, to control the immigrant population by retaining the possibility of retaliating against their kin in the event of crime or insurrection. The direct result of these restrictions was that most of the migrants were men until the ban was finally lifted in 1795 (Lee, 1995: 43). The resultant roving bands of unmarried men were later seen as one of the major causes of social unrest. Shepherd notes that “much of the debate on immigration policy was conducted in terms that asked whether bachelors or families would be more law-abiding on the frontier or whether it was ethical to keep families divided, rather than focusing on the desirability of further reclamation or even the economic problems of the southeast coast where the migrants originated” (Shepherd, 1993: 139). It is not surprising that recent genetic studies have shown a remarkable amount of mixing between the Han and Aborigine gene pools (Stainton, 1999: 40).

The Qing similarly went through a series of reversals in their policy towards the settlement of Aborigine land. On the one hand, those who sought to encourage immigration and land reclamation as a means to extend the rule of law to the unruly

frontier. While, on the other hand, there were those who advocated protecting Aborigine land from encroachment, and setting strict limits on immigration (Shepherd, 1993: 16-18). The local administration, often in response to Aborigine rebellion, routinely ordered surveys of the boundary between Han and Aborigine settlement, as well as the construction of huge earthen walls to mark the limits of permissible Han settlement. Each time the surveys simply acknowledged the previous boundary transgressions as a fait accompli, and did little to halt future movement across the boundary.

Qing policy towards the Taiwanese was heavily influenced by their encounters in other peripheral regions of the Qing, such as Yunnan and Quanzhou 泉州 (*Quánzhōu*). But it was also shaped by the existing relations that had initially been established by the Dutch, and were continued through the Zheng era. The Formosan Aborigines encountered by the Dutch were the descendants of peoples who had been living on the island as far back as 4,500 BCE (Thorne 1997: 83-85). At the dawn of the seventeenth century there still existed over 19 language groups (see Chapter 1), with significant variation between those groups in both cultural practices such as the nature of kinship relations and the size of individual communities, as well as differences in material culture that largely matched the geographic distribution of the communities. Still, there was considerable similarity as well, with society being based mostly on “swidden cultivation of millet ... hunting of deer ... and fishing” (Shepherd, 1993: 29). Warfare was common, as well as headhunting, but villages also had peaceful contact and would inter-marry (1993: 29). The deer population, whose trade had been so important for the Dutch, was

beginning to dwindle by the Qing era and the former hunting grounds were quickly opened up for Chinese settlement.

In discussing the Aborigines, the distinctions used by the Qing were the same that they used wherever they encountered indigenous populations: *Raw* 生 (*shēng*) and *Cooked* 熟 (*shú*), a distinction that ostensibly referred to how “civilized” the indigenous people were, meaning how sinicized. In practice, those living in the plains tended to be more “cooked” than those in the mountains, although not necessarily so. Although scholars such as Jack Goody (Goody and Watt, 1968) have attributed this distinction to the presence or lack of literacy in the population, the Taiwanese case seems to suggest that it was the willingness to pay taxes and enter into military alliances with the Qing that earned Aborigines the “cooked” designation. This is shown by the “Song of the Sinicized Aborigine”:

Knowing that officials are in the city,
[they] go before the yamen and bow.
Twittering like birds -- no Chinese understands;
uncomprehended, [they] gesture to make pictures. (Martin, 1994: 54)

Literacy often came later, when their allegiance was rewarded with schooling, a topic we will return to later. Still, the records show that many Aborigines were literate at the time, with some even using the Romanized script they had learned from the Dutch a hundred years earlier to translate Chinese land contracts before signing (Shepherd, 1993: 252-53).

The Ownership and Reclamation of Land

Central to understanding Taiwan's agrarian economy, is the unique system of dual-ownership that developed "through the process of frontier land reclamation," so well documented by John Shepherd.

Wealthy and well-connected persons acquired government land patents allowing them to reclaim large tracts of wasteland and obligating them to pay land taxes once the land was reclaimed. Some land-grant holders invested in reclaiming the land, built irrigation canals and terraces, and recruited immigrant settlers as ordinary tenants. In other cases the tenants themselves invested labor and capital in reclaiming the land and thereby acquired a right of permanent tenancy. These reclaiming tenants could not be evicted as long as they paid the patent holder a large-rent fixed in perpetuity; this right of permanent tenancy was called the small-rent right. In many communities, neighboring civilized aborigine tribes, rather than wealthy Chinese, held the land patent rights ... (Shepherd, 1993: 8-9)

Over the course of the Qing period, the power of the small-rent holder gradually came to eclipse that of the large-rent holder, and brought with it a commensurate change in Taiwan's class and ethnic relations.

The emergence of a tripartite land ownership system (large-rent, small-rent, and tenants) in Taiwan looks superficially similar to similar arrangements that arose on the Mainland. However, on the mainland the "owner/taxpayer" was often forced to sell partial title to the land in exchange for having their taxes paid or reduced for them through the personal connections of an official who therefore gained rights to the land. In Taiwan, on the other hand, the small-rent holder gained rights in perpetuity to the land for a fixed fee and gained power by himself becoming a rentier (Ka, 1995: 26). This meant that when the tripartite system declined, towards the end of the Qing period, in favor of a

dual ownership system (finally recognized as such during the Japanese era), it was these peasant landlords, rather than the upper gentry whose power was solidified.

The small-rent holder had numerous advantages. The large-rent holder frequently lacked the resources, knowledge, or simply the desire to do the work necessary to reclaim the land. Whether because they were cash-poor Aborigines, with little experience at wet-field agriculture, or because they were urban gentry who were only in it as an investment, the net result was that the small-rent holder would front the money, knowledge, and labor necessary to make the land profitable. The small-rent holder could lease land to tenants on a yearly basis as well as collect half of the produce as tribute, while the large-rent owner only received his fixed income, upon which he had to pay tax (Chen, 1999: 139-40).

From the 1780s onward, many resident secondary leasing agents replaced the absentee primary leasing agents as the managerial class and major source of rural capital and loans, effectively making them the dominant social class in the countryside. Whenever primary leasing agents were in need of cash they would pawn their ownership rights to rich peasants (that is, the farm managers). Thus, the relationship between the proprietor and the tenant farm managers emerged into one of leaser and banker. As a result, the ownership rights of proprietors, particularly among the aborigines, gradually slipped into the hands of the farm managers. (1999: 138-39).

Ka further elaborates on the sources of small-renter power:

He was (1) the organizer of land reclamation, (2) the leader of hired militia that made possible the invasion of aboriginal land and protection of tenant farmers against aborigine attack, (3) the provider of initial expenses during land reclamation, and (4) the coinvestor in irrigation systems. (1995: 21).

For absentee landlords this system simply meant that they continued to receive a fixed income while the renter was able to make a considerable profit; however, where

Aborigines were the landowners, this meant that they lost control of their land. In both cases, the right to a steady fixed rent eventually withered away.

Not all Aborigines lost everything. Some successfully entered the landlord class, and in the process adopted Chinese names, customs (including ancestor worship and the maintenance of family genealogies), and even wives (Chen, 1999: 153; Shepherd, 1993: 389). But most were simply unable to make the transition to the new agricultural methods and associated lifestyle changes. Already in 1748 there are found reports describing “‘civilized’ aborigines as ‘impoverished’” (Shepherd, 1993: 274). Eventually, the pressure became too much, and groups of Aborigine villages migrated en-mass to the unsettled plains in Ilan 宜蘭 (*Yilán*), on the northeast coast, and the Puli 埔里 (*Pǔlǐ*) basin in Central Taiwan in 1804 and 1823 respectively (1993: 358).³

One way that the Qing state dealt with the pressures facing the Aborigines was to create Aborigine military colonies. Starting in 1787, these colonies were set up along the Han-Aborigine border, ostensibly to protect the border from Raw Aborigine raids; however, for most of the early nineteenth century these Aborigine troops were used to suppress ethnic feuding amongst the Han settlers (1993: 333, 357). Only towards the end of the Qing period were they mobilized against the Raw Aborigines (1993: 357). The use of Aborigines in this manner was so common that when the Qing nearly lost Taiwan to the Lin Shuangwen Uprising 林爽文之亂 (*Lín Shuǎngwén zhī luàn*) of 1786-7, 2,000 Aborigine military colonists from Sichuan joined the 50,000 mainland troops that were called in to quell the rebels (1993: 324, 334). In the next section we will explore the

nature of the many rebellions as well as the communal strife that engulfed Taiwan for so much of its early history.

Rebellion and Ethnic Violence

The frequency of rebellions, riots, and ethnic feuds in Qing Dynasty Taiwan is often commented upon with a reference to the saying “every three years an uprising; every five years a rebellion” (Kerr, 1965: 4), and indeed, the sheer extent of violence is truly remarkable: “From 1684 to 1895, 159 major incidents of civil disturbances rocked Taiwan, including 74 armed clashes and 65 uprisings led by wanderers. During the 120 years from 1768 to 1887, approximately 57 armed clashes occurred, 47 of which broke out from 1768 to 1860.” (Chen, 1999: 136). In classifying these outbreaks, the Qing state did not distinguish between communal conflict amongst local communities and uprisings against the state, both of which were viewed as rebellions (Lamley, 1981: 309). As we will see, there is some logic to grouping them together. First of all, “Taiwan's most serious rebellions of the Ch'ing period ... all involved subethnic strife” (1981: 307).⁴ And, secondly, both did emerge out of tensions between state and local power. Local elites were forced by the weakness of the state to turn to village elders, regional organizations, strongmen, and secret societies in order to secure their power (Chen, 1999: 145). The state, in turn, exploited local factional divisions to maintain control of the island, with the unintended consequence of conflagrating these tensions.

Up till now, I have used the term “Han” to refer to all of the settlers from the Mainland, but it was only at the end of the nineteenth century that there seems to have

emerged something akin to a unified Chinese identity in Taiwan. Having left their families behind, settlers were unable to rely on traditional lineage networks for support. Instead, they tended to form associations based on linguistic and regional differences associated with their place of origin. They set up temples to deities popular in their home region rather than ancestral halls (Lamley, 1981: 295). Many settlers also joined secret societies, such as the Heaven and Earth 天地會 (*Tiāndihui*) society responsible for the massive Lin Shuang-wen uprising mentioned above. After this last major uprising was put down, feuding between ethnic groups embroiled the island in communal violence from the 1780s to the 1860s. When the violence finally subsided, and a Chinese identity did begin to emerge at the end of this period, it was through a combination of factors, including class differentiation between small- and large-rent holders, government led efforts to reclaim the last remaining Aborigine lands, and the loss of Taiwan to the Japanese in the Sino-Japanese war (Harrell, 1990).

Immigrants to Taiwan came mostly from three locations on the southern coast of China: two different regions of Fujian province: Zhangzhou 漳州 (*Zhāngzhōu*) and Quanzhou, as well as from Guangzhou province. The Fujianese from Zhangzhou and Quanzhou comprised the majority of the population, and both spoke mutually intelligible varieties of the same language – Southern Min, or Hoklo. The differences between these two varieties have diminished in time, so that now most people no longer distinguish between Quanzhou and Changzhou varieties of Hoklo, but during the first half of the nineteenth century it was not uncommon to be killed for one's regional accent (Ownby,

1990: 87). Many of the Guangzhou migrants were from the Hakka ethnic minority, and even those Hakka who were not from Guangzhou are often associated with that region.

The Hakka are one of the four major ethnic groups in Taiwan. Having purportedly migrated to Guangzhou from Northern China during the Song Dynasty (960-1279), they found a niche in the sparsely populated mountainous regions of the south, living in close proximity with the She aboriginal group, from whom they adopted many economic and social practices. The language seems to have been adopted from the local southern population as well (Leong et al., 1997: 4, introduction). The Hakka became experts at cultivating difficult mountainside terrain, of little value to other farmers or tax collectors (1997: 6, introduction, 33). The Hakka are famous for having a relatively egalitarian gender system, which allowed the women to go with their feet unbound.⁵ The main advantage of which was that the women and children could tend to the farming, while the men engaged in migrant labor and mining (1997: 9, introduction). In Taiwan, the Hakka tended to occupy the same ecological niches that they had lived in on the mainland. There are two schools of thought on this, with some arguing that they preferred these areas, knowing better how to utilize them, and others arguing that they moved there only after being driven out by inter-ethnic strife with the Hoklo population (1997: 56).

The Hakka and the Aborigines were both occasional allies of the Qing, especially during the early years of their rule on the island. Two northern Aborigine communities rebelled in 1699, and in 1721 there was the infamous Zhu Yigui Rebellion 朱一貴事件 (*Zhūyīguì shìjiàn*) during which the government was forced to flee its capital in Tainan. In both cases, the government was able to play one group against another to secure its

rule. When the Aborigine tribes in the north rebelled, the Qing were able to count on the support of the An-li Aborigines to put down the rebellion. This policy initially backfired in suppressing the Zhu Yigui Rebellion, as the Aborigines sided with the rebels after a series of government missteps; however, the government soon found support amongst the Hakka ethnic community (Shepherd, 1993: 129). These same Hakka braves helped again later that year when nearly two thousand Aborigines “surrounded Chang-hua city, devastated the area around it, and slaughtered the soldiers stationed at two nearby military posts” (1993: 130). As a result of their loyalty and bravery, the Hakka earned the right to increased immigration quotas and also greater quotas for the imperial examinations (Lee, 1995: 92; Leong et al., 1997: 54; Shepherd, 1993: 212). And during the last major anti-government revolt, the Lin Shuang-wen rebellion discussed earlier, Hakka and Quanzhou loyalists helped put down a simultaneous uprising in the North, while Raw Aborigines put down the last remaining rebels who had fled to the mountains (Shepherd, 1993: 324, 326).

The ineffective and corrupt bureaucracy of the Qing is often blamed for the frequency of uprisings and communal violence (Lee, 1995). Early on in the process of both the rebellions and ethnic feuds there was often an appeal for state intervention, and it seems as if many of these disturbances might have been avoided if the state had not ignored or mishandled their claims; forcing people to turn to secret societies or local strongmen to seek justice (Ownby, 1990: 81). However, as we have seen, it is perhaps the particular strategies adopted by the Qing state, rather than lack of effort which was responsible. One Qing official is quoted as saying: “We are fortunate ... that the different

groups are divided and will not yield to one another. Whenever evil people rise up, their ethnic enemies become yimin and fight them” (1990: 93, n. 54). The Qing’s use of non-standard troops to guard the island also created problems. These so-called “Green Standard” troops were themselves from either Quanzhou or Changzhou, and would often side with their homeland compatriots in the violence (1981: 309-10). These Green Standard troops were only replaced by professional troops in 1875 (1981: 290-91).

The state cannot bear all of the blame for Taiwan’s violence. Shepherd has admirably shown that Taiwan’s administration was not necessarily less effective, nor more corrupt than other peripheral regions of the Qing Empire (Shepherd, 1993: 6). The class structure of local society must also be examined. Chen Chiukun, in discussing the ethnic feuds, or *xiedou* 械鬥 (*xièdòu*), states it most forcefully,

Generally speaking, the major goal of such clashes was to gain control over land resources and water rights. But by far the most important reason was to use these forces to maintain and enlarge the power of the landlords at the local level in a situation in which Ch’ing officials could not effectively protect the property rights of landlords (Chen, 1999: 136).

Ownby also sees control of resources as central to the *xiedou*, arguing that by the end of the eighteenth century the settlement of Taiwan ended its “pioneering phase” resulting in attempts to solidify local power (Lamley, 1981: 304; Meskill, 1979: 84; Ownby, 1990: 78). However, for Ownby, this only explains how these feuds started. He claims that landlords turned to local strongmen to fight their feuds for them, but that these professional militia leaders had a vested interest in escalating and prolonging the violence beyond what their bosses would have wished for (Ownby, 1990: 76).

The fluidity of frontier society meant that strongmen and gentry were not two distinct classes, but that there was a certain fluidity between them:

Rural strongmen were, in short, both rivals and colleagues of urban elite figures. They represented an unofficial power in the countryside, but they were always candidates for entrance into the regular local elite. Should a strongman decide to launch his son into the gentry, or should he aspire to official rank himself, neither the local elite nor the local magistrate would stand in his way. (Meskill, 1979: 91)

Harrell elaborates:

On the whole, the militia leaders were members of wealthy local families, many of them somewhat literatized, who seem to have been trying to hold on to their local power, to the support of their tenants, hired laborers, and clients, in the face of a changing social order (Harrell, 1990: 120-21).

When the feuding finally did come to an end in the second half of the nineteenth century, it was, Harrell argues, precisely because of changes that took place in the status of local elites and strongmen.

The Qing did worry about the consequences of this feuding, especially the possibilities it presented for foreign intervention on the island, but many of their efforts to control it were futile. In particular, efforts were made at introducing local village security councils, or pao-chia “under which registered households were organized into small units and the inhabitants held accountable for each other's actions” (Lamley, 1981: 310). But these only worked as long as they remained actively supervised by government officials (1981: 311).

What finally brought an end to the xiedou, according to Harrell, is the social changes brought about by increased commercialization, combined with this increased government control. As Lamley points out, “growth and development, at least, continued

in those parts of Taiwan most affected by recurrent subethnic strife” (1981: 307) The gentry even managed to organize work crews of “mutually estranged Hoklo and Hakka workers” (1981: 307). Harrell argues that these changes fostered a class division among the island’s elite:

Ethnic conflict and *xiedou* were clearly no longer viable strategies for these men: the supralocal economy had become too integrated by commercialization, and government control of local society had strengthened somewhat with Liu's administration. Their real adversaries at this point were the big operators ... whose holdings increased dramatically in the late nineteenth century and probably seemed very threatening to the livelihood of small landlords (Harrell, 1990: 121).

This coincided with the decline of the large-rent holder. Where the large-rent holder was an Elite, this now meant that they came to be enmeshed in state-based tributary relations based on educational credentialism (1990: 122). On the other hand, the small-rent holder gained power vis-à-vis the tenant, and their relationship became more commercial and more exploitative: employing strategies such as “shorter periods of lease, deposits required in advance, and sometimes requiring a tenant to lend the landlord a large amount of money free of interest in order to secure cultivation rights” (1990: 117).

All this happened under a regime that sought to increase tax revenues through greater state control at the local level (1990: 119). Regular army troops were brought in, and local militias were united together in an island-wide effort to “enter the mountains to rule the Aborigines” 入山撫蕃 (*rùshān fūfān*) (1990: 118). By the time the Japanese came, Taiwan had actually been declared a separate province of the empire, but it was too late.

Harrell points out that the general outlines of the history of Taiwanese ethnic relations could easily fit into E.E. Evans-Pritchard's model of segmentary systems, in which lineage groups form tactical alliances at higher and higher levels of abstraction (family, kin-group, village, etc.) depending on the nature of the threat (1990: 105). Thus, we see residents of Quanzhou fighting residents from Changzhou, then the two groups uniting against the Hakka, followed by all three groups uniting against the Aborigines, etc. (and it might even be possible to extend the model to the national level struggle against the Japanese) (1990: 110). But Harrell argues, and I believe rightly so, that the players and conditions for each level of struggle were quite different and actually represent changes at the social-structural level, not just tactical moves on the part of key players. In the middle of the nineteenth century, "local leaders could mobilize followers through ethnic ties to be able to consolidate their own positions" (1990: 111). Such place-based networks had accomplished all the process of opening up the land, and building up irrigation works (1990: 112). By the 1880s the situation had changed. The land ownership system which had favored the small-rent holder to encourage opening up new land, now led to the decline of the large-rent holder's power over the local population and its channeling into more official forms of power which had previously not been accessible. One of the most important of which was education.

Qing Education

The Qing was ostensibly a meritocracy, with bureaucratic privilege legitimated through an examination system that tested mastery of an esoteric corpus of Confucian knowledge.

While there existed a belief that anyone could pass the exams if they studied hard enough, there was not a tradition of public education to ensure that everyone had the chance to pursue such studies. Throughout the Ming and the Qing dynasties there were various attempts to provide widespread access to education, but these were generally short lived and unsuccessful. One paradox of Qing educational policy is that such efforts were generally greatest in the regions where state policy was weakest, but inhabitants of these areas often had the least to gain by associating themselves with the central state. One exception was that of indigenous populations, where the state was an important ally against the immigrant Han population. Before discussing the specifics of Qing education in Taiwan, I will first discuss some general features of the Confucian examination system. Education in Taiwan to this day continues to be influenced by the ideals of this system and it is important to understand how it worked in practice.

The Confucian Examination System

The Qing civil examination system required families to invest heavily in the education of children in order to memorize extensive texts written in a language that differed considerably from vernacular speech. Although this system is often hailed as a meritocracy of sorts, the sheer numbers (three million candidates for the biennial provincial exams, out of a total population of 300 million Chinese in 1800 (Elman, 2000: 236)) of examinees meant that luck or cunning was at least just as important as one's technical mastery of the classics. Most examinees remained in the system to maintain their status as literati, thus providing their kin with tax breaks and exemption from corvée

labor, even if they themselves never passed the exams. Some became clerks in the local administration, while others became private tutors. Passing the exams remained, however, the holy grail of family expectations. By having just one member of the family enter into officialdom, the entire family would gain much more than just the associated prestige. Officials could help families push civil cases through the legal system and start investigations into the affairs of their enemies (Meskill, 1979: 158-59), they could also collect taxes. Hill Gates argues that state limits on the accumulation of private wealth forced families to convert their private wealth into a means of gaining public power (Gates, 1996: 38). For this reason, clans would even invest in the schooling of their poorest relatives, lest they show talent for mastering the difficult curriculum.

The training regime was truly excruciating, although not impossible for young children with good memories and strong family support. Elman has pointed out that the unequal distribution of the “linguistic and cultural resources” necessary for full mastery of classical literacy effectively excluded nearly ninety percent of China’s population from the competition (Elman, 2000: 247).⁶ Still, the limited number of positions available kept the competition fierce. Elman estimates that while “minimal” literacy may have only required knowledge of some 2,000 glyphs, full classical literacy required mastery of over 10,000 (2000: 266)!⁷ The road to classical literacy consisted of “a three-stage learning process: (1) memorization of Chinese graphs; (2) reading the Four Books, one of the Five Classics (until 1786, when all the classics had to be memorized), and the Histories; (3) and composition” (2000: 262). Composition, especially the “eight-legged” essay 八股文

(*bāgǔwén*) required for the highest level exams, was a highly refined skill; not necessarily mastered in the process of acquiring passive reading skills.⁸

The Qing was a time during which schooling began to receive increased importance vis-à-vis the examination process. As early as the eleventh century, reformers had called for increased importance to be placed on dynastic schools as a means of selecting officials, but they remained little more than examination training centers (2000: 17, 127-28). Degrees were conferred by one's rank on state exams and could not be given by the schools. Although there were always some academies, such as the famed Hanlin academy whose students seemed to have a direct link to positions of power within the higher echelons of the imperial state (2000: 160). It is interesting to note that the standards of elite literacy were even higher for the Hanlin entrance examination than they were for the imperial exams.⁹

There was also a separate system of schools set up for the imperial family, and for the Manchu and Mongolian military bannermen (Crossley, 1994: 352). The Qianlong 乾隆 (*Qiánlóng*) emperor was especially concerned about preserving Manchu and Mongolian language and culture, even making it possible to take the examinations in either language (1994: 361). However, the fact that women did not receive schooling meant that preservation of this minority language, especially in its archaic form, was a losing battle (1994: 366). The importance of these schools declined over time, in parallel with the decline of banner power:

The role of governors once envisioned of the bannermen had faded very early in the Ch'ing period under insurmountable pressures to meet continuing military challenges and to give way in civil affairs to the

well-entrenched Chinese bureaucratic class. But the curriculum still demanded not only competence in the Four Books and other foundational works of the civil examinations but also technical competence in military skills, translation, mathematics, and astronomy. Small wonder that few banner men were attracted by either the challenges or the rewards of the banner educational institutions (1994: 359).

As the examinations grew in importance the banner schools, as well as the dynastic academies, became little more than “quota-based way stations for students to prepare on their own for civil service examinations and receive stipends for their efforts” (Elman, 2000: 127). Because these schools both presupposed a mastery of classical literacy, training which was “left to the private domain,” few of the schools remained important, with the exception of the prestigious Hanlin academy (2000: 128).

The academies were only for advanced study. Earlier training took place at the home, with literate mothers (2000: 241), a private tutor, or at a lineage run school. For much of late imperial Chinese history, the southern gentry dominated the examinations, academies and imperial bureaucracies precisely because of their heavy investment in such lineage schools (2000: 92). Students at these schools would receive a stipend while studying, and if they actually passed the exams would often receive special award money from the clan as well (2000: 128).

While the gentry were able to perpetuate their class status through such lineage schools, “merchants, artisans, and other commoners, however, frequently lacked access to the proper linguistic training and educational facilities for mastering literati political and moral discourse.”

To address this problem, charitable schools (*i-hsueh* [義學 (*yìxué*)]), some within but most outside lineages, increasingly were created. They represented the intermingling of gentry charitable institutions, elementary

education, and local philanthropy, and complemented “community schools” (*she-hsueh* [社學 (*shèxué*)]) set up by the dynasty to deliver instructions to deserving local commoners. In such semi-official charitable institutions, “primer literacy” could commence for an elementary student from a poor family or one from a poorer segment of a well-off lineage. Buddhist temple schools also fulfilled this function (2000: 246).

Whereas the *she-hsueh* were often a means of subsidizing elite education, the *i-hsueh* were genuinely open to the community (Leung, 1994: 384). Such charitable schools became quite widespread. Charitable schools rarely provided stipends or even lodging for their students, and classes were often held at the local temple, so the only real costs involved supporting and paying for the teacher. However, their dependence on local funding (the state provided no support) meant that they often did not last very long, “ending with the term of an enthusiastic magistrate, or when donations from a private individual stopped” (1994: 391).

Although they were modeled in part on lineage schools, the curriculum at charitable schools differed quite considerably in form and purpose. The primers used for charitable schools emphasized characters found in daily life, rather than the esoteric literacy of elite education (Rawski, 1979: 49). They were not set up to train students to take the examinations, and it was not expected that they would learn more than a basic functional literacy. Evelyn Rawski argues that the widespread use of characters in printed advertising, village record keeping, tax collection, popular songbooks, etc. points to widespread and vibrant literacy in Qing China (1979: 109-22). Certainly, a basic knowledge of under two thousand basic characters could greatly enable one to handle numerous daily bookkeeping tasks: “Written contracts were used for purchasing or mortgaging real estate, for renting land, hiring laborers, borrowing money, and even for

selling children” (1979: 9-10). Boilerplate contracts of this sort were often included in the popular almanacs sold at this time (1979: 114).

The existence of a vibrant printing industry certainly was closely related to the popularity of charitable schools, but not necessarily in a utilitarian way. In fact, Leung persuasively argues that the charitable schools were much more motivated by elite concerns with popular morality than with a desire to provide vocational training. According to Leung, it was the easy availability of seditious and morally questionable tracts that motivated the elite to set up i-hsueh (Leung, 1994: 378-79). In fact, the schools were often founded by the same “community philanthropists who, later in the nineteenth century, organized regional ‘bureaus to burn and destroy licentious writings’” (1994: 401). This moral focus was reflected in the curriculum, which emphasized Confucian rituals, self presentation, proper forms of address to peers and elders, cleaning the classroom, etc. (1994: 398). The end result was a bifurcated education system, and while truly gifted students might be recognized as such and given a chance to study for the exams, most charitable school students were simply taught enough to know their place in the system.

By the end of the nineteenth century the Qing system of education began to break down as reformers sought to replace the deteriorating examination and charitable school systems with a true public education system. The most obvious sign of the systems failure was the sheer number of degrees that were sold rather than obtained by taking the examinations. Purchase, as well as “recommendation” had long been alternative means of advancement, but by the end of the nineteenth century the numbers had gotten out of

hand (Elman, 2000: 126-27). While in 1764 less than one quarter (22%) of officials had simply purchased their degrees, by 1871 more than half (51%) of literati degrees were paid for (2000: 227). These figures do not include the many more that were got by bribing examiners, paying other people to take the exam, buying the questions before they were published, or other such schemes (2000: 196). At the same time, the portion of the population who had some degree of literacy had never been higher. Political changes, such as the Opium war and the Sino-Japanese war, increasingly cast doubt upon the Confucian system and led people to look to Japanese and Western educational models as alternatives. By 1901 the eight-legged essay was removed from exams, and the entire system came to an end in 1905 w (2000: 595, 604).

Elite Education in Taiwan – The Lin Family

After the Qing took Taiwan over from the Zhengs it became a prefecture of Fujian province, and the few students who passed the local prefectural exams had to compete against the rest of the province in order to go on to the highest-level exams at the imperial palace. However, immigrants often were required to take the exams in their place of origin, so presumably the earlier settlers did not take exams as inhabitants of Taiwan prefecture (Lamley, 1981: 134). Because the Qing were eager to prevent a concentration of power from any one region in China, special quotas were assigned to each prefecture and province. The combination of these factors meant that Taiwan had high quotas but few eligible candidates. As a result, gentry from the mainland would illegally come over

to take the exam, displacing some qualified local candidates in the process (Lee, 1995: 145; Shepherd, 1993: 212).

Until 1823, the majority of Taiwanese degree holders were either those who had taken the military exams or those who had been recommended for a military degree (“Military Recommended Men”) (Lee, 1995: 16). The military exams did require knowledge of the classics, but it was much more limited than the exams for the literary degrees, and cheating was quite rampant (Elman, 2000: 184-96). The exams also tested strength and military prowess, especially riding and archery (Lee, 1995: 257). The government created a number of seemingly honorary titles that it bestowed upon the local population, such as “Ceremony Students, the Music-dancing Students, and Worshipping students” (1995: 183).¹⁰ Such titles, like those of the “Military Recommended Men,” were a useful means of granting legitimacy to local strongmen and others who were willing to demonstrate their loyalty to the Qing.

By the dawn of the nineteenth century, however, local elites had begun to consolidate their power. In Meskill’s account of the Lin family, we see how the local elite in Chang-hua “began to invest their wealth in the appurtenances of gentry culture.”

They gave their sons a classical education and made them compete in the higher examinations. Soon after 1800, the district began to produce at least one chü-jen in each of the triennial examinations held at Foochow, and some of these men went on to compete in Peking. In 1823 a native son first gained the chin-shih. A second one, three years later, did well enough to be elected into the prestigious Hanlin Academy. Others followed. Soon, several of these higher degree-holders held office on the mainland; others, and the bulk of the lower literati, lived at home, strengthening the higher culture in the district (Meskill, 1979: 79).

These new gentry families seem to have set up several academies in the town, as well as a district gazetteer to document their own achievements. Yet, for many, it was easier to simply purchase a degree than to actually pursue the arduous study, and the “financially hard-pressed government” seems to have been eager to oblige (1979: 80).

As the frontier became more settled, it also became harder to make wealth quickly through agriculture alone (1979: 81). While some were able to convert this wealth into new forms of power through education, the weakness of the government in the region during the middle of the century meant that other routes to wealth and power were often more attractive. This was certainly the case for one of the more notorious members of the Lin family, Wen-ch’a:

Failing in a preliminary examination, he gave up the academic life altogether and returned to Wu-feng, probably in the early 1840's. Here, he studied what he truly liked: proficiency in arms, the ruses of war, and the delicate art of gaining and holding his men's loyalty (1979: 95).

Only when the Qing reasserted control of the island in the seventies did education seem to become important again to the Lin family. Ongoing lawsuits and numerous enemies made it important for them to gain the good will of powerful friends. “In 1874, for instance, the family granted travel money to an aspiring scholar on his way to Peking for the examinations. Such a gift, a familiar ‘social investment’ to gain a promising man’s favor, was a first for the Lins also” (1979: 159). Ten years later we see several members of the family pursuing the difficult examination path rather than simply purchasing their degrees (1979: 200-01). Even more surprising, perhaps, is the degree to which these students actually internalized the Confucian principles they were studying, developing a “genuine love of literature, and particularly of poetry” (1979: 202). Some of these fully

socialized literati actually sacrificed their wealth and power in Taiwan when the Japanese came, “abandoning their home and refusing to serve another ruler” (1979: 204). Qing education had seemingly succeeded in Taiwan, just when the Qing dynasty itself had faltered.

Education in Taiwan – Rewarding Loyalty and “Civilizing” Aborigines

While elite education in Taiwan was often privately funded by elites eager to gain access to power, there were two important aspects of education where the Qing state actively intervened. The first was in its ability to establish regional quotas, and the second was in the establishment of community and charity schools. Although such schools rarely received direct government funding, state policy seems to have ‘encouraged’ local elites to provide resources with which to fund the schools (Rowe, 1994: 432). Both of these areas of state policy making were directly involved in the formation of ethnic relations in the settlement of Taiwan. More often than not, it was ethnic minorities, such as Aborigines and the Hakka, who benefited most from state intervention in education.

Regional examination quotas were an important means of social control, often utilized by the Qing to reward loyal supporters, ensure that power would be evenly distributed geographically, and to cultivate the development of local elites “to cultivate the growth of a Confucian literati in regions where the state’s influence was weak” (Shepherd, 1993: 210).

Throughout the Ch’ing period, in fact, the government was generous in granting academic and expectant-office titles (conferring gentry status and privileges) to eminent

members of all three major subcultural groups as rewards for their services. Moreover, special Yueh (Kwangtung) quotas were established for civil and military *sheng-yuan* [生員 (*shēngyuán*)] degrees in 1741 in an attempt to appease Taiwan's Hakka population. Thereafter, the competition became so keen among Hoklo and Hakka scholars about the island that quotas applicable to both groups were gradually enlarged. Early in the nineteenth century, a separate Yueh quota was also introduced for island Hakka competing in the provincial examinations held in Foochow (Lamley, 1981: 311).

The creation of special quotas for the Hakka was, no doubt, affected by the important role they played in helping suppress the Zhu Yigui rebellion, as well as later uprisings. These policies were also instituted in the Hakka homelands around the same time. In 1730 Yuanzhou prefecture instituted special Hakka quotas to diffuse ethnic tensions there (Leong et al., 1997: 70).

Aborigines also benefited from special quotas, but the lack of a Confucian tradition meant that it was also necessary to provide basic schooling as well. After the suppression of the large-scale Aborigine revolt of 1731-31 in the village of Ta Chia Hsi 大甲西社番亂 (*Dàjiǎxīshè fānlùn*), Aborigine schooling was expanded with a large number of imperial schools:

In 1734 the Taiwan intendant Chang Ssu-ch'ang proposed that instructors be appointed in every county to educate aborigine youth in schools and that county directors of study conduct seasonal examinations in these schools. A total of 47 aborigine schools were founded, the great majority in villages that were also major aborigine taxpaying units ... Seven of the schools were founded among the tribes participating in the Ta-chia-hsi revolt (Shepherd, 1993: 132).

Three of the subdued tribes demonstrated their commitment to adopting Chinese values by petitioning the emperor to allow them to adopt Confucian maxims as names for their tribes (1993: 132).

From Shepherd we know that the curriculum of these Aborigine schools was modeled directly upon that of the community schools in the villages: “Emphasis was at first on character recognition and calligraphy and then on recitation and memorization of the [classical Chinese] texts” (1993: 372). But the main focus was on Confucian morality.

Both teacher and text spoke of notions of social hierarchy, duty, obligations to parents, and the subordination of women. Rudimentary cosmological notions rooted the imperial state and Confucian morality in the natural order of heaven, earth, and man. Students were taught the duties appropriate to each of the five cardinal relationships of ruler-minister, father-son, husband-wife, older-younger brother, and friend-friend ... as well as the key virtues of loyalty and filial piety. (1993: 372-73)

Around the same time as the Qing were quelling the large eighteenth century rebellions in Taiwan, they were also trying to extend their rule over another rebellious peripheral area heavily populated by indigenous peoples: Yunnan province. There, even more than in Taiwan, education of the indigenous population represented one of the most extensive efforts at “public” education undertaken during the Qing. Ch’en Hung-mou, a particularly zealous official who governed Yunan in the 1730s, sought to implement what was “no less than a state-sponsored system of universal male childhood education” (Rowe, 1994: 428). As with what we have learned about charity education elsewhere in China, the main purpose was to proselytize Confucian values rather than to promote mass literacy. It is true that there were some notable “examination successes” - enabling a few members of the indigenous elite to gain official status through the examination system was, no doubt,

good politics, but these new literati rarely returned home¹¹ after gaining their new status (1994: 444). Despite these exceptional cases, the thrust of Ch'en's innovative education system remained focused on primary education and the teaching of Confucian values (1994: 437).

The motivation for proselytizing Confucian values to the Aborigines is not too different from that which had earlier motivated the Dutch to preach Christian values to Taiwan's Aborigines in the seventeenth century. The Dutch, who had also established extensive schooling for the Aborigines, demanded that villages destroy their idols before they could receive a school, and they sought to end the many practices that did not conform to European norms for relations between the sexes. Among the Siraya Aborigines 西拉雅 (*Xīlāyǎ*), men would live with their age-grade association until they were too old to hunt. Only after retiring from the age-grade association would the men settle down with a woman to form a family (Shepherd, 1993: 65). But for the Dutch with their protestant work ethic, equally disturbing was the men's refusal to engage in agricultural labor, which was considered women's work. But there was also an ulterior motivation — by teaching the men to plow, the Dutch sought to divert them from inter-village warfare and rebellion (1993: 81).

Rowe's description of the motivations for educating Yunnan's indigenous population sounds remarkably similar:

At the same time, kinship reform was seen as a prerequisite to economic development. The male-headed domestic unit, the practice of sedentary agriculture, and the institution of private (household) property were inextricably linked in a version of agrarian idealism not all that different from that of the Lockean West ... Household proprietorship of agricultural land, in China as in the West, was "one of the central notions in the

organization of social life" and private landownership "one of the major positive values in the culture." ... From the state's point of view, moreover, household proprietorship was basic to civil law ... and to fiscal accountability. It was expected to give rise to an indigenous propertied elite who, given the educational opportunities offered by the new school system, would become the backbone of the new social order (Rowe, 1994: 425).

Although Taiwan's educators presumably shared this moralizing principle, they seemed to have been less zealous than Ch'en. In fact, Shepherd argues that officials were quite tolerant of Aborigine "nonconformity" which "unlike some heterodoxies, ... did not challenge the dominant cultural order, because it reinforced a separate ethnic identity for plains aborigine braves that served Ch'ing divide-and-rule methods of control" (Shepherd, 1993: 382). Moreover, without Ch'en's innovative methods of securing local funding for schools (Rowe, 1994: 428), it was difficult to sustain any kind of public schooling in Taiwan. The Qing state "did not allocate scarce tax revenues to mount a sustained educational effort. Rather, periodic campaigns to set up schools were launched either by the few vigorous reforming officials or in reconstruction efforts following major disturbances when lack of education was always identified as contributing to social disorder" (Shepherd, 1993: 373).

As in Yunnan, there were some Aborigines who were able to accumulate enough wealth and literacy to enter the ranks of the Chinese gentry, but the effect of this on the rest of the Aborigine population seems to have been rather minimal. There is some evidence of Confucian discourse being used by the Aborigines themselves in their dealings with the state. When a group of Aborigine villages signed a contract to settle the Puli basin in 1823, they used "Confucian terms" to express "their loyalty to the

Confucian state” as well as to “complain bitterly of their treatment by Han settlers” (1993: 382). They were thus able to use the official discourse to petition the state to recognize their claims for the territory (1993: 392). But there was always some tension between Aborigine and Confucian social values. Even when they adopted Chinese surnames, it was often done in a very non-Chinese way:

The most commonly adopted surname was P’an, which is the Chinese character for barbarian (fan) written with a water radical added. Plains aborigine adoption of Han surnames generally did not reflect a sinization of family and clan organizations. So many families adopted the P’an surname in some villages that the Chinese practice of surname exogamy was impossible. Other groups transmitted their Han surnames matrilineally or changed them at will (1993: 384).

Moreover, it seems that the marginalized position of plains Aborigines made them receptive to nineteenth century Christian missionaries who came to the island in the 1870s, leading to mass conversions to Christianity (1993: 382).

As the Qing attempted to consolidate control of the island at the end of the nineteenth century, they continued to establish schools for Aborigines, especially on the West Coast regions that had just come under their control. When Taitong 台東 (*Táidōng*) Prefecture was established in 1875, “the textbook *Proverbs for the Instruction of Savages* was approved” for use in the new schools.

At this time plans were made eventually to establish 44 schools for Aborigines in Taidong and Hualian Prefectures; however, only seven were actually opened, four of which were in Pangcah areas in 1880. The curriculum, besides apparently providing an introduction to Confucian morality, seems to have been limited to language instruction. After two years in these schools the majority of students could speak the Minnan dialect; but dissatisfaction with the regular use of corporal punishment soon caused attendance to drop, and by 1886 the schools existed in name only (Thorne, 1997: 114-15).

In response to military encounters between Aborigines and both the French and the Japanese, the Qing felt that it was necessary to further secure Taiwan from foreign intervention. In 1886 Taiwan became a full province and was placed under the command of “an aggressive governor with a military background, Liu Ming-ch’uan [劉銘傳 (*Liu Míngchuán*)]” (Shepherd, 1993: 360). Liu instituted a policy of using brute force, rather than Confucian morality to subdue the Mountain Aborigines (Harrell, 1990: 118).

The Last Days of Qing Rule in Taiwan

Liu’s new aggressive strategy was motivated by the need to consolidate Hakka and Hoklo Chinese against a common enemy, as well as to provide the expanding population with much needed land. An even more important motivation for these expensive mountain campaigns was the rising importance of camphor for Taiwan’s economy. Starting in 1865, trade with Americans in camphor had increased considerably (Thorne, 1997: 125, n. 60). Many Hakka risked losing their heads as they ventured into the mountains in search of camphor, but the rewards were great enough to warrant the risks (1997: 124-25). “During the years 1891-95 Taiwan exported 30% more camphor than all of the rest of the world” (1997: 125). Still, Liu’s expensive mountain campaigns were severely criticized, and he was eventually forced to change tactics.

Governor Liu sought to reduce his control costs by following an old Taiwan pattern: he offered to accommodate the raw aborigines of the mountains with allocations of land and rights to collect rents from Chinese settlers. At the same time he sought to increase his revenues through an island-wide cadastral survey to enroll “hidden” land on the tax registers (Shepherd, 1993: 360).

Part of Liu's restructuring involved the reduction of rent paid to the primary landowners (large-rent). The shifting of the tax burden to the small-rent holder offset the loss of income from this shift.

Altogether, Liu was able to triple the land-tax revenue collected by the Qing, but his modernization initiatives, as well as his military campaigns meant that costs were even greater (1993: 361). He undertook a number of initiatives, such as the building of Taiwan's first railroad, building the foundations of modern Taipei, and dredging the harbor at Jilong, all of which (including his aggressive tactics against the Mountain Aborigines) would later be continued by the Japanese (Harrell, 1990: 118-19). Many of his projects, such as the dredging of the harbor, were never completed for lack of funds. Added to his problems was the refusal of the newly pacified Aborigines in the East to remain pacified.

18 Aborigine villages in eastern Taiwan with a total population of 50,000 had agreed to submit in 1887. Yet in June of 1888 a major revolt began among the Siraya near Yuli; before it was finally suppressed in September with the aid of naval forces sent from North China the revolt had involved Hakka, Rukovon Pyuma and Pangcah as well ... (Thorne, 1997: 112).

The rebellion was finally suppressed, and the leaders taken on a tour of major Chinese cities in Taiwan and on the mainland, "the purpose of which was to impress them with the prosperity and scale of Chinese society" (1997: 112-13). Despite the quelling of the rebellion, Liu's expenses were too much for the weakened Qing state to justify, and his tenure as head of the short-lived Province of Taiwan came to an end in 1891.

In 1895 Taiwan was ceded to the Japanese after the Sino-Japanese war. There was some hope that Taiwan would be able to declare itself an independent state and gain foreign aid to defend itself against the arrival of the Japanese troops.

the provincial governor, Tang Jingsong, along with other officials and gentry, announced the formation of the Democratic State of Taiwan (Taiwan Minzhu Guo [台灣民主國]), and along with establishing a constitution, printing paper money, and taking over many of the administrative functions of the former Qing government, also organized military resistance to the Japanese occupying forces (Harrell, 1990: 99).

As we have already seen, there was widespread support for the resistance by a newly emergent Taiwanese elite made up of “the elites of communities that had, only forty years earlier, fought each other in a series of inter-ethnic feuds,” but who were now united along class lines (1990: 103). However, the Japanese quickly squashed the resistance, and Taiwan entered the Twentieth century as a Japanese colony.

Conclusion

Kathy Walker has, citing Bernhardt, remarked that “the history of the Qing is in a large part that of landlords and the state attempting to adjust to peasant victories so as to maintain control of peasant surpluses” (1999: 10-11). The situation in the Taiwan periphery, where the landlord class never had a firm grip over the rural peasantry, is something of an exception to this rule. We have already seen that the process by which a dual-ownership system emerged in Taiwan parallels, but differs from that in the mainland. While on the mainland, “recognition of the dual-ownership system and its protection in customary law amounted to a compromise on the part of the state-elite between landlord and peasant property” (Walker, 1999: 10-11), in Taiwan it was the result of the system of

land reclamation which gave power to the small-renter from the very beginning. Still, it is true that the island's endemic violence only subsided once the reality of small-renter land ownership was tacitly recognized by the state. This recognition also enabled the state to dramatically increase revenue from land-taxes, and was soon officially recognized by the Japanese after they took power (Ka, 1995: 51).

Hill Gates offers a different explanation of tensions between the state and local power under the Qing. For Gates, the political economy of China for the past thousand years is a struggle between two competing economic systems: the tributary mode of production (TMP) and the petty-capitalist mode of production (PCMP) (Gates, 1996). The former is characterized by state-based client-patron relationships arranged in a pyramid, with the emperor at the top, and courtiers, officials, clerks, etc. below him, all the way down to the family unit which mirrors the system-at-large through rigid patriarchal relations. It is this system that is legitimated by Confucian values at both the state and the family level: justifying the extraction of taxes by the state and of filial piety and female subservience within the family. The TMP seeks to limit the development of market relations that could undermine the power of the state and disrupt the kin-based relations of production that are its foundation.

The PCMP is also dependent upon kin-based relations of production, and Gates points out that the PCMP benefits, to a certain extent, from the autonomy granted the family-unit under the TMP (1996: 38). However, the PCMP is firmly entrenched in market relations. In addition to the buying and selling of land, almost every other aspect of their life had been monetized for hundreds of years before the arrival of foreign capital.

Gates is careful to point out that the existence of markets does not mean the existence of capitalism (1996: 33). Although the buying of daughters and sons was often a purely monetary transaction, labor was only sold in a fairly limited market, it was the uncompensated labor of family members that drove the economy.

Walker takes Gates to task for failing to “take into account structural changes in the forms of commodity production or in the historically specific social relations through which it was constituted” thus providing a static view of Chinese social relations (Walker, 1999: 22). Gates does seem to see the model as equally applicable to both Modern China and the Qing era and, indeed, the specific formulation of class relations in Taiwan does seem to get lost in the grand narrative of TMP-PCMP conflict (Gates, 1996). However, the model does provide us with a useful tool for thinking about certain aspects of state formation in the Taiwanese periphery, where local institutions always seem to have sought a degree of autonomy from the state.

Although the PCMP benefits from the state’s preservation of patriarchal relations, and individual petty-capitalists benefit from maintaining patron-client relations, the tendency of petty-capital is to expand the monetization of social relations, something which fundamentally threatens the tributary relations upon which the privileges of state actors are based. This creates a fundamental tension that explains the contradictions underlying Qing era land policy in Taiwan. In a pre-industrial economy, land was simultaneously the foundation of the tributary relations and the basis of petty-capitalist wealth. Land had been a commodity in China since the Song, but the extent of its commoditization was inversely related to state power. Taiwan, especially during the early

settlement years, was a case of fairly extensive commoditization. The system of land reclamation allowed for small-renters to both avoid paying taxes as well as to make money by becoming moneylenders to both the large-rent owners and sub-tenants.

What is especially useful for our study is the link Gates makes between the different modes of production and the related ideological systems by which they were legitimated. Gates contrasts the Confucian rituals that legitimate tributary relations with the folk rituals that continue to thrive under petty-capitalism. For example, the practice of burning spirit-money to pay off supernatural debt is a clearly monetized spiritual transaction that accurately represents the way people actually experienced state morality (1996: 168-73). In light of this discussion, it is interesting to note that temples to local deities were one of the most important sites of resistance against the state in Taiwan (Lamley, 1981: 295). These contrasted sharply with the Confucian temples built by the state (Lee, 1995: 102). We also see the conflict between folk and official traditions in the history of Taiwanese education. Aborigine matrilineal traditions were one of the main targets of Confucian education, as was the desire to impart a respect for Confucian social hierarchies outside the family.

Class differentiation at the end of the Qing meant that there did emerge an elite culture rooted in classical literacy, but the land ownership system had resulted in a large landowning elite not tied closely to the state. Although there was a move towards the development of lineages temples, temples to local deities and place-based associations remained strong. Linguistically, attempts at standardization of the official dialect failed

early on and were not repeated. The end of Qing rule created a space for the initial, short-lived, rise of a Taiwanese nationalist identity grounded in these traditions.

Aborigines who had not been able to assimilate or join the elite class were increasingly marginalized. Many were forced to migrate or rebel against increasingly hostile forces. However, the increasing importance of trade in camphor, rice, tea, and sugar meant that Aborigine lands were more valuable than ever before. Mountain Aborigines, whom the state had long left at arms length, found themselves increasingly under attack by ethnically unified Han forces. As with the Liu's modernization drives to build trains and dredge harbors, these military incursions into the mountains would be continued even more aggressively by the new Japanese rulers.

Notes

¹ In the North, the Aborigines had been colonized by the Spanish, rather than the Dutch. When the Dutch drove the Spanish out in 1640, the Aborigines asked the Dutch to provide a priest who could lead the Catholic mass, causing some consternation among the Protestant missionaries (Shepherd, 1993: 72).

² In addition to this “brigade” land, there was also “government land” (which had been cultivated in the name of the King during the Dutch period) farmed by Chinese immigrants, as well as “private land” which was actually land owned by officials and members of the most powerful clans (Ka, 1995: 13; Lee, 1995: 30; Shepherd, 1993: 97).

³ It is these nineteenth-century migrations that have given rise to the common misperception that Chinese settlers pushed taiwan’s plains aborigines into the mountains or, in a different version, that the ancestors of all present-day mountain aborigines lived on the plains. Both versions are incorrect. Many plains groups never participated in the migrations, and those that did, did not do so in toto. Rather, many plains aborigine villagers remained and became increasingly sinicized. Moreover, those that resettled migrated not into the mountains but to plains areas free of Han domination (the east coast and the P’u-li basin). (Shepherd, 1993: 358)

⁴ Stephen Harrell objects to the term “subethnic” on the grounds that it serves no purpose which could not be accommodated just as easily by the term “ethnic.” I believe he is correct to attribute the term to the “silly” and “unconsciously politically motivated” notion that they are subdivisions of a larger Han Chinese ethnic group (Harrell, 1990: 109, n. 16).

⁵ Leong argues that the Hakka were unique in not binding women’s feet only because they conformed earlier than other groups to Qing banning of the practice, whereas other groups resisted (Leong et al., 1997: 10, introduction).

⁶ Elman deliberately avoids using Bourdieu’s terminology of linguistic and cultural “capital” but for our purposes we can easily substitute Bourdieu’s terms for Elman’s.

⁷ “Altogether there were about 48,000 different characters in late imperial times, but many of them were simply variants.” (Elman, 2000: 266)

⁸ The eight-legged essay was something of a cross between the stylistic requirements of a contemporary five-paragraph essay and a classical sonnet. The term “leg” actually refers to couplets, with each couplet consisting of two legs. Each essay consisted of four couplets, or eight “legs” (Lee, 1995: 113). The form of the essay was very rigid, with two sentences assigned to a discussion of the title of the essay, and then an elaboration of that discussion (which had to be either “negative” if the opening discussion was “positive” and vice-versa). All this would then be followed by the essay itself, which had to be “written in a dialectical sequence: beginning, extension, antithesis, synthesis,” each part punctuated by the four couplets (1995: 113-14). Elman notes that surviving examination essays all contain “numerous small circles marking exactly the balanced and antithetical clauses in each leg of the essay” (Elman, 2000: 394).

⁹ Unlike the imperial exams, which had eliminated poetry and “belles-lettres” during the Ming, the Hanlin academy continued to require it on their exams (Elman, 2000: 163), and by 1800 it was a fairly common feature of the curriculum at most private academies (2000: 550).

¹⁰ From this time it became customary to include among the *i sheng* (ritualists) aborigine students who failed to obtain the *sheng yüan* degree. The *i sheng* served as musicians and performers in the solemn ceremonies school temples conducted each spring and autumn to honor Confucius; among their privileges was exemption from labor service (Shepherd, 1993: 374).

¹¹ Scholars were required to serve the government outside of their home province, as a means of controlling corruption.

CHAPTER 4
THE CARROT AND THE STICK: CONSENT AND COERCION IN THE
FORMATION OF TAIWAN'S LANGUAGE MARKETS

Introduction

Speakers of Taiwan's local languages suffered under repressive monolingual policies for fifty years, from 1937 to 1987. First, under Japanese military rule during World War II, Japanese had been the National Language 國語 (*kokugo* in Japanese). Then, when the KMT arrived at the end of the war, Mandarin Chinese became the new National Language (*guóyǔ*). It still is, but with the end of martial law in 1987, restrictions on local language use in the media were lifted and local language instruction was allowed in the schools, even becoming part of the official primary school curriculum in 2001. These changes symbolize an important shift in how Taiwanese come to think about "nation." Both the Japanese and the KMT viewed Taiwan as only part of a larger nation. The use of the language of Tokyo or Beijing as the official language of Taiwan was intended to drive this point home. But the end of martial law did not end the dominance of Mandarin in Taiwan. In part, this reflects the continued dominance of the Mainlander elite in national politics, but it also reflects the complexity of linguistic and ethnic relations in Taiwan. Although over seventy percent of Taiwan's population claims Hoklo¹ as their mother tongue, the large number of Hakka speakers as well as presence of a significant Aborigine population makes it politically unfeasible to simply replace Mandarin with Hoklo. Moreover, despite the symbolic importance of local languages, they are all in

decline, although it is only the Austronesian languages which are in danger of dying out completely, and it is unclear that current policies will do much to reverse this trend (Tsao, 2001). Not only is the existing linguistic hierarchy firmly entrenched, but Taiwan's precarious political status, as well as its dependence on international trade, have further complicated the language situation. Mandarin is no longer simply the language of Taiwan's elite, it is also the language of its largest trading partner. Local languages must also increasingly compete with English, the "global language" (Crystal, 1997).

Taiwan's language situation raises two important questions. The first is why the end of martial law did not spell the end of Mandarin's dominance in Taiwanese society? The second is why, even during the most repressive years, the state was unable to prevent the continued and persistent use of local languages, especially Hoklo, as the language of business and of the marketplace? For while the state was successful in raising a generation of Mandarin speaking Taiwanese who had only limited proficiency in their mother tongue, they were unable to stop the widespread use of local languages by the native speaking adult population. I argue that it is only possible to answer these questions if we understand language markets to be a byproduct of the process of state formation, a process whose primary goal is the formation of a stable historical bloc between the ruling class and various subordinate groups, and whose secondary goal is preventing the emergence of alternative historical blocs (see Chapter 2).

The forces which created a powerful rural gentry class in Taiwan (see Chapter 3) continued to operate during the Japanese era, and thorough into the early years of KMT rule when large scale land reforms were implemented. Even then, this class only became

stronger by their full scale entry into the global marketplace as owners of small and medium sized enterprises (SMEs). Despite the continued strength of this class, it is only in the last thirty years that they have finally secured a leadership position within the ruling bloc, and even now that position remains unstable. In each era, Qing, Japanese, and the early years of KMT rule, the ruling bloc has alternated between conciliatory gestures and the full scale repression of the gentry classes. The vital role played by this class in the Japanese war time economy ultimately undermined more repressive tendencies. The brutal suppression of local elites by KMT soldiers after the February 28, 1947 uprising 二二八事件 (*èrèrbā shìjiàn*) destroyed any short term hopes for legitimacy, and the establishment of normalized diplomatic relations with the People's Republic of China (PRC) in the 1970s further undermined their legitimacy. Nonetheless, the KMT was able to hold on to its power by relying upon the power structures that had been initially established during the Qing era, and solidified during the Japanese colonial period. These included alliances with various subaltern groups, including workers at state owned companies, farmers and Aborigines, as well as the educated elite who depended upon state patronage. Coercion continued to play an important part in state policy, thousands “disappeared” during the White Terror 白色恐怖 (*báisè kǒngbù*) which lasted until the 1980s, but it is impossible to rule a country by coercion alone. The government sought to impose its own ideology of Chinese nationalism upon the country and even, pressured by its ally the United States, instituted reforms such as local elections and land reform, both of which would pave the way for the collapse of the existing historical bloc in the eighties (see Chapter 6).

In this chapter I argue that the continued strength of Taiwan's local languages reflects the strength of the rural gentry class, and the inability of the ruling historical bloc to completely suppress the power of this class. This is true of both the Japanese and the early KMT periods. At the same time, it is important not to equate the imposition of official languages (Japanese or Mandarin) with coercion. Language policy is fundamentally ideological, and as such it serves to mask coercion by imbuing those who control the official language with greater legitimacy. At the same time, however, only by understanding the continuity in the ruling historical bloc under both the Japanese and the KMT can we see that the transition from Japanese to Mandarin as Taiwan's official language did not mark a fundamental transformation of the nature of hegemony in Taiwan.

The Construction of Linguistic Markets During the Japanese Era (1895-1945)

Japanese Language Policy

Early on, the Japanese devoted considerable effort to teaching Japanese to their new colony. The first Japanese Language Institute was established in 1895, under the direction of Izawa Shuji 伊澤修二, whose battle for Western-style public education had fallen on deaf ears in Japan, and who saw a chance to implement his ambitious policies in the new colony (Tsurumi, 1984: 13). Izawa saw the role of the Japanese colonial government as that of patient educators who could uplift the Taiwanese by example, not unlike the views of that other famous colonialist, Thomas Macaulay (Macaulay, 1952). For Izawa, "Japan was to guide Taiwan in a 'teacher-student pattern'" (Heylen, 2001: 136). Unfortunately

for Izawa, in January of 1896, while he was away in Japan recruiting teachers rebels, rebels attacked the school in Shisangan 芝山岩 (*Zhīshānyán*), killing six teachers (Tsurumi, 1977: 15). While the event was later used by the KMT to symbolize Taiwanese resistance to the Japanese, under the Japanese it was to become a symbol of the sacrifice and devotion of the teachers who died. On the first anniversary of the event, six of the former students “including the only female, Ke Qiujié - cut off their Qing-style queues before the teacher’s tombs” (Fong, 199: 140). While the symbolism of this event would be resurrected during the wartime Kominka movement, it was too late for Izawa, who was forced to resign in face of differences over his assimilationist goals (Tai, 1999: 512). The Kodama 児玉源大郎 administration, which assumed control in 1898, replaced the Language Institutes with “with common schools (*kogakko*) [公學校], providing a six-year course elementary education” (Heylen, 2001: 136). But these schools were a far cry of Izawa’s dream of universal public education. There was practically no government funding for the schools, and “all school expenses except the salaries of Japanese teachers were charged to the local school district” (Heylen, 2001: 140; Tai, 1999: 512; Tsurumi, 1984: 280-81).

Initially, the Japanese common schools were unable to compete with the traditional Chinese private schools (*shōbo* 書房 in Japanese) to which many of the local elite still sent their children. In 1898, attendance at *shōbo* outnumbered that of common schools 29,941 to 7,838,² numbers which are all the more striking when compared with only 17,000 students in the *shōbo* the previous year (Heylen, 2001: 137)! The continued popularity of the *shōbo* can be partially explained by the fact that, even though the

traditional Confucian examination system had been dismantled by the Japanese, the local elite were not convinced that Japanese rule would last for very long (2001: 137; Tsurumi, 1984: 283, n. 20). The popularity of the shōbo, and the fact that funding for the common schools depended upon the generosity of the local elite, created a situation where the Japanese were forced to offer classes in the Chinese classics in order to lure students away from the shōbo.

During their first four years in common school, children worked their way from the Three Character Classic primer up to the Analects of Confucius under the eagle eye of a native scholar. Only in the fifth and sixth grades did they learn to read these texts in tortured Japanese “upside-down” fashion. Most attention was given to written and spoken Japanese, but Confucian ethics were inculcated with the Japanese written syllabary and pronunciation system (Tsurumi, 1984: 283).

When the Education Bureau completed the seven year process of creating new textbooks for the common school system in 1906, the texts made extensive use of Hoklo translations³ for the purpose of teaching Japanese (Heylen, 2001: 142-43). The Japanese policies were effective, and by 1918, Shōbo attendance was insignificant compared to the large number of students at common schools (2001: 149).⁴ By 1920, a quarter of Taiwan’s school aged population was in school, and nearly forty percent of school-aged boys (Tsurumi, 1984: 286).

Despite the educational gains signified by the slow advance of public schooling, upward mobility was severely restricted for Taiwanese students. Students were frequently denied admission to the more prestigious primary schools on the basis of “Japanese language backwardness” (1984: 289). But when the Sino-Japanese war broke out in 1937, Japan sought to integrate its colony more closely into the empire. The Kominka

movement 皇民化 – literally, a movement for the “imperialization of subject people” - aimed to create greater loyalty to the emperor through a number of policies, including language and education reforms (Tai, 1999: 517). Most significantly, public education was expanded, and by 1942 nearly sixty-five percent of the school aged population, and more than half of the females, were in school (Friedman, 2002; Tsurumi, 1984: 291).

Japanese efforts to promote the Japanese language under Kominka seem to follow Bourdieu’s dictum that pedagogy is about establishing the “legitimacy of the dominant culture” (i.e. creating consumers of culture) as opposed to actually providing the skills necessary to participate in the production of that culture (Bourdieu and Passeron, 1990: 38-41). As of 1920, the colonial government’s statistics show only 2.86 percent of the population as able to understand Japanese (Chou, 1991: 63). It was not until 1929 that a program was established to teach Japanese to those outside of the common school system:

These programs were generally called “Japanese study programs” (*kokugo koshajo* [國語講習所]). The Taiwanese aged between 12 and 25 who did not speak Japanese were eligible for enrollment. The programs did not charge any tuition; the minimum number of schooling days was 100 days a year and 2-3 hours of study each day. One could finish the program in a period ranging from 1 year to 4 years. Yet, because of budget shortages and the need to accommodate the peasant’s farm work schedules, the government offered a compromised version of this language study program, with a shorter study period (60 days a year) for people over 25. Schools of this sort were referred to as “basic Japanese study programs” (*kan’i kokugo koshajo* [簡易國語講習所]). These outreach programs expanded quickly. By April 1937, there were 2,812 “Japanese study programs,” with 185,590 students, and 1,555 “basic Japanese study programs,” with 77,782 students (1991: 64-65).

The impact of these programs is questionable. In 1940 one man reported that his mother, who had been in such a study program for a full year, was unable to speak “even a word of Japanese” (1991: 66).

While there was a rapid expansion in basic schooling in Japanese at the very end of the Japanese period, Kominka era language policies were primarily inducements for elite families to adopt Japanese manners and speech. The two most important campaigns were the “National Language Family” (國語家庭) program started in 1937, and the “Name Changing Campaign” (改姓名) started in 1940 (1991). It was only at this late date (1937) that Chinese was banned from the newspapers and Chinese courses were eliminated from the common schools, who no longer had to compete with the shōbo (1991: 69). (Although, as I discuss below, there still was some limited Chinese allowed in the newspapers.) The National Language Family program did not originate at the national level, but at the level of the local prefecture government in Taihoku (now Taipei), and was subsequently copied by other prefectures (1991: 73). Importantly, the designation of a family as a one that spoke the national language was a privilege, not a requirement. The Japanese colonial administration dolled out this particular form of Japanese cultural capital as a means of buying off the elite. Gramsci pointed out that the use of corruption is typical of those situations where “it is hard to exercise the hegemonic function, and when the use of force is too risky” (Gramsci et al., 1972: 79, n. 49).⁵ It carried a number of significant benefits. In addition to a certificate, a medal, and a plaque that was placed on the outside of the house, there were a number of other privileges to induce families to get certified:

First, the children of such families would be allowed to enter an elementary school were the majority of students were ethnic Japanese ... Second, their children would enjoy favorable consideration when they were trying to enter a high school. Third, the members of such families would be given priority over others for employment in government offices ... and in public organizations. Fourth, the members of such families enjoyed better chances of getting certain business licenses. ... Apart from these specific benefits, they were to “enjoy convenience and receive special favor whenever possible” (Chou, 1991: 78)

But the conditions for gaining certification were quite stringent: “Officially there were two conditions to meet. (1) The condition of being a Japanese-speaking family... (2) The condition of showing enthusiasm to cultivate the Japanese spirit ... if its members selflessly devoted themselves to war-time donations or voluntary labor” (Fong, 1993: 120). And there were even more conditions that were attached at the prefectural level:

(1) the extent to which family members communicate in Japanese, taking into consideration their motives, efforts, and duration, (2) the extent to which they had been Japanized in religion, clothing, and daily life, and (3) the extent to which they had become true citizens by paying taxes, interacting with the metropolitans, and involving in community service (Fong, 1993: 121).

The difficulty of getting certified meant that only a small portion of families were able to do so. “By April 1942, there were 9,604 such families, involving 77,679 individuals, constituting about 1.3 percent of the total population of Taiwan” who had managed to be certified as National Language speaking households (Chou, 1991: 80). Although the standards varied from district to district, with some districts only requiring “people who understand Japanese,” and others with much more stringent requirements (1991: 77).

In 1940 the government changed the rules so that it became possible, for the first time, for families to legally adopt Japanese names (1991: 113). The requirements to qualify for name changing were similar to those for becoming a National Language

speaking family, although less stringent. The use of the Japanese language at home was required, but not to the same degree, as was “enthusiasm” about “Japanization” (1991: 115-17). Even though far more people adopted Japanese names than had sought certification as National Language speaking households, those who changed their names still represented a small portion of the total population. They were mostly the educated elite: government employees, such as “policement, primary school teachers, local government staff,” or merchants, doctors, and other professionals (1991: 131-34). Although there were a burst of name changes in the last months of Japanese rule, after the government eased restrictions in 1944, by 1943 only 17,526 families (or 126,211 individuals out of a population of over six million) had changed their names (1991: 128; population estimate from Huang, 1995: 32).

Some of the resistance to name changing derived from rules which prevented the Japanese name from being easily derived from the Chinese name. This was especially troubling for Chinese who have a strong proscription against same-surname marriages (1991: 143). Similarly, the Japanese names were also not supposed to reflect the place of origin of the family, as was the case with Chinese names. This was an obvious attempt to undermine the place-of-origin based alliances among the Taiwanese population, which had caused so much havoc during the Qing era (1991: 148). Nonetheless, Taiwanese creatively found many creative ways around such restrictions, and it was often possible to guess from the Japanese name what the Chinese name had been (1991: 140).

Resistance and Alternative Language Markets Under Japanese Rule

To a certain extent, the Japanese succeeded in creating a generation of elite Taiwanese who identified with Japanese language, and culture. But it was only after the start of the Sino-Japanese War that they began to fully embrace the idea of the assimilation of the local population. During the early years of Japanese rule, assimilation was seen as a threat to the authority of the Japanese colonial elite. This can best be seen by the quick reaction to the Taiwanese “Assimilation Society” created in 1914, under the leadership of Count Itagaki Taisuke 板垣退助 (Chen, 1972: 478-80; Fong, 1993: 79; Heylen, 2001: 170-71). Because of Itagaki’s high stature in Japan (he had been a prominent figure in the Meiji Restoration), the government waited for Itagaki to leave the country in 1915, before launching attacks against Japanese members of the society in the local papers, causing its collapse (Chen, 1972: 480; Fong, 1993: 79). Despite this setback, many Taiwanese continued to try to work within the system, fighting for Taiwan and Taiwanese to have greater autonomy within the Japanese Empire. Most notably was the Taiwan Parliament Petition Movement 台灣議會設置請願運動 (*Táiwān yìhuì shèzhì qǐngyuàn yùndòng*) established in 1920 in response to the reinforcement of the much hated 1896 law, “law number 63,” which, while it made steps towards encouraging assimilation, “preserved the legislative power of the government-general and thus continued to hinder Taiwanese legal assimilation” (Tai, 1999: 513, see also: Chen, 1972: 484; Heylen, 2001: 225). Such efforts were not to succeed until the very end of the Japanese era when, in 1945, Taiwanese won the right to limited representation in the Japanese Imperial Diet (Kerr, 1965: 35).

During the last years of Japanese rule, more and more Taiwanese were able to gain access to higher education. While their options in the colony were restricted to medical and teaching academies, many were able to gain admittance to the top universities in Japan. There, they were exposed to the latest teachings on nationalism, socialism, and other ‘subversive’ ideas. One of the central forces behind the Parliament Petition Movement was the New People’s Society 新民會 (*Xīnmín huì*), founded by Taiwanese students studying in Tokyo in 1920 (Chen, 1972: 482; Chou, 1991: 20). Soon after their founding, the organization started a bilingual (Japanese and Chinese) journal called *Tai-Oan Chheng Lian* 台灣青年 (Taiwan Youth, *Táiwān qīngnián* in Mandarin), which eventually transformed into “the only Taiwanese owned daily newspaper” the *Taiwan New People’s News* 台灣新民報 (*Táiwān xīnmín bào*) in 1932. It was in the pages of these papers that the Taiwan Nationalist Movement 台灣民族運動 (*Táiwān mínzú yùndòng*) can be said to have first taken shape (Heylen, 2001: 236).

While the kominka movement had banned the local languages from the schools and newspapers, and seemingly made Taiwan more Japanese, a small number of elites were developing the seeds of a new Taiwanese nationalist culture, grounded not in classical Chinese, but in the languages of ordinary Taiwanese. Influenced by the vernacular writing, or baihua 白話 (*báihuà*), movement in China, Taiwanese intellectuals debated whether it would be better to use Chinese characters or a Romanized orthography to preserve the Hoklo language spoken by most Taiwanese (Fong, 1993: 174; Friedman, 2002). 1920 was the year that vernacular Mandarin Chinese was first

introduced into the primary schools in Republican China, using the newly devised orthographic system, the National Phonetic Symbols (注音符號 *zhùyīn fúhào*) (Heylen, 2001: 326). At the same time a “nativist literature” was growing in China and Japan, which also influenced the Taiwan Youth writers (2001: 377). While there were strong advocates for creating such a literature in Hoklo, much of these debates was actually carried out in written Mandarin vernacular (2001: 281). According to Ann Heylen, the “Written Taiwanese movement was not intended to create a separation from Han cultural identity,” but sought to maintain those connections by “defining their own place within the Chinese language” (2001: 383). This has not stopped contemporary writers from seeing this movement as an incipient Taiwanese nationalist movement (2001: 383). This was not so easy to do. Already, “proponents for a Written Taiwanese were confronted with a dilemma”:

On the one hand, they had to provide solid arguments that Taiwanhua [Hoklo] was not a dialect, and on the other hand, they had to find a means to show that the creation of a written Taiwanese was not trying to break away from the tradition of a unified language for the Chinese nation. (2001: 426)

One solution to this dilemma was to demonstrate the rich heritage of existing Hoklo vernacular culture. Between 1934 and 1936, the Taiwan Literary Association (臺灣文藝聯盟 *Táiwān wényì liánméng*) published several anthologies of “popular literature, which included folksongs, nursery rhymes and legends,” and even riddles (2001: 433).

The publication of such materials up until the start of the kominka movement in 1937 raises the important question of why the colonial authorities tolerated such publications? Especially considering the reaction of the government to earlier expressions

of Taiwanese autonomy. Heylen points out several reasons: (1) the publications were censored, (2) the government used such journals as an important source of information, and (3) the readership represented “the new colonial elite, which formed one of indispensable backbones in the economic development of the colony” who bought the many Japanese products advertised in the pages of these papers (2001: 439). The Government even officially sponsored several publications on Taiwanese language and culture, and a “burgeoning” Japanese entertainment industry promoted songs and movies in Hoklo (2001: 442). While Heylen’s reasoning makes sense, it is important to put this flourishing of Taiwanese culture within a wider context. The period between 1919 and 1936 was one in which Taiwan was under civilian, rather than military Governor-Generals. This greater liberalism in Japanese colonial policy corresponded to a period of greater liberalism within Japanese politics as well (Peattie, 1984: 20). However, when Japanese liberalism was pushed aside with the start of the Sino-Japanese war, it was not possible to completely reverse the effects of the policies of the liberal era. This was due, in part, to war time political-economic developments which served to strengthen Taiwan’s landowning elite.

The Formation of Historical Blocs under the Japanese

Desiring for the colony to be both profitable and to supply the mainland with much needed raw materials, much of Taiwan’s agricultural land was given over to sugar production. While the norm for colonial sugar production is a plantation style economy, the strength of the small-renter class in Taiwan prevented the Japanese from proceeding

along the same lines (Ka, 1995: xvii, 100). In 1909, the one major attempt at forcing the sale of land to the sugar company resulted in a violent uprising and ended with the resignation of the civil affairs bureau chief (Ka, 1995: 95). Instead, the Japanese were forced to increase local productivity through agricultural technology and attempt to force sugar cultivation through control of the local markets. The result was as impressive as anything accomplished by the post-war Green Revolution. Government investment in irrigation projects, fertilizers, and training increased productivity over eighty-one percent by 1938 (Friedman, 2002; Ka, 1995: 61)! Despite inroads in state control of the agricultural sector, rice subsidies for Japan's farmers in the 1930s had the effect of raising prices and greatly increasing the profitability of growing rice as opposed to sugar. As increased productivity made this class ever stronger, the Japanese countered by strengthening tenant's rights and organizing farmer's cooperatives (Ka, 1995: 174-75) (Friedman, 2002). Still, the living standard's of Taiwan's peasants, and the power and autonomy of its landowning farmers, increased dramatically (1995: 144).

The tenant's associations formed by the Japanese were an attempt to stifle any incipient class consciousness emerging among the tenants:

It is interesting that, despite the diversity of peasant grievances and issues, only one area - that of landlord-tenant relations - was chosen by the Japanese for remedial efforts. ... Class interests could not be allowed to develop ... The choice rested with the formation of landlord-tenant associations (*Gyodenkai*) modeled on those in existence in Japan. They were quasi-governmental, quasi-private bodies (Wickberg, 1976: 572).

Although these organizations never included more than one percent of Taiwan's rural population (1976: 573), they laid the institutional groundwork for how the KMT would work with local farmers (see Chapter 6). Equally important were local irrigation

associations, which had been important even before the Japanese period, but which were heavily subsidized by the Japanese. “84 percent of the irrigated area came under the supervision of semi-official irrigation associations” (Ka, 1995: 61).

It was also during the Japanese period that elections were implemented at the local level in Taiwan. In the thirties, in response to political activism on the part of the Taiwanese elite, and at a time that the Japanese government felt the need to rally support for the oncoming war, limited local elections were allowed for the purpose of choosing half the members of local assemblies (the rest being appointed by the Japanese).

The franchise for these early elections was extremely limited: only men over the age of 25 who paid more than five yen in taxes each year could vote, and voter rolls and campaign materials were subject to police approval. In 1935, 187,000 persons were qualified to vote, comprising 14.6 percent of Taiwan's Japanese residents and 3.8 percent of the Taiwanese population (Rigger, 1999: 36).

Although franchise was limited, the symbolic importance of these elections must not be underestimated. They established democratic traditions in Taiwan, even if they did not develop substantive democracy. It served the interests of the Japanese by “dividing local elites, encouraging ambitious Taiwanese to develop individual political bases instead of joining organized movements” (1999: 37-38). It also socialized Taiwanese into the rituals of electoral politics, with nearly 300,000 Taiwanese registered to vote by 1939 (1999: 37-38). This would have important long term consequences when the KMT crushed Taiwanese dreams of democracy after World War II. But, by the time that elections had started to become a regular feature of Taiwanese life, Japan was drawn into World War II, and military authorities shifted the colony to wartime footing, putting an end to these democratic experiments. But the precedent was set, and all of these institutions: local

elections, semi-official local associations, etc. would be adapted by the KMT to solidify their legitimacy in Taiwan.

The Poetry Societies

Before proceeding to discuss the transformation of Taiwan's political economy under the KMT, it is first necessary to take a moment to explore a lingering division within the Taiwanese elite. At the end of the Qing era, those who had embraced the Confucian education system either fled the country or embraced the Japanese (see Chapter 3). These bureaucrats, beholden to the state, were allowed to keep their Classical Chinese cultural capital throughout the Japanese era. Not surprisingly, they were not supporters of the new vernacular Hoklo culture. They had invested heavily in the cultural capital of Classical Chinese for hundreds of years, and were not about to let it go. Those who had remained in Taiwan after the Japanese arrived were not much of a threat to the Japanese regime, and in addition to providing Classical Chinese education in the common schools, they also encouraged the continuation of the poetry societies.

The formation of local poetry societies, construction of garden estates and artistic accomplishments, such as painting and calligraphy during Qing-Taiwan are clear manifestations of the integration of the Taiwanese frontier society into the Chinese cultural sphere. This development did not occur until the beginning of the 19th century (Heylen, 2001: 74).

These societies continued into the Japanese era, but not without changes. Under the Japanese the membership was much younger, and "consisted of propertied gentry cut off from the traditional method of joining the government, which was by passing civil service examinations" (Fong, 1993: 167). Over time they lost their literary focus and

became dues-collecting social clubs with regularly scheduled meetings (Heylen, 2001: 152-53). While they may initially have been a forum for expressing nationalist sentiment, they were quickly appropriated by the Japanese regime, which gave them official support (Fong, 1993: 167). Heylen points out that the continuation of these societies should not be seen as a form of resistance to the Japanese regime:

An examination of the membership of these three poetry societies shows that its leading members all came from wealthy and prominent families, and were in regular contact with the Japanese colonial authorities. More importantly, a relatively large number of them had adapted to the changes brought about under colonial rule. Some of them openly supported the Japanese educational policy and criticized the incompetence of Qing scholarship (Heylen, 2001: 154).

The poetry societies offered young Taiwanese an avenue for advancement within colonial social life. The societies would hold contests, and the poems of the winners would be published in the newspapers - an activity much decried by the advocates of vernacular Hoklo culture (Fong, 1993: 17; Heylen, 2001: 333; Hsiao, 1990). Most revealing is that when Chinese was banned from the newspapers in 1937, the printing of poetry society poems was allowed to continue (Fong, 1993: 168).

Consent and Coercion after Retrocession

Disappointment and rebellion.

Having already won some concessions from the Japanese colonial administration during the 1930s, the Taiwanese had every reason to believe that they could expect their new Chinese rulers would create an even more equitable society in which ethnic identity would not be a barrier to social advancement. There was reason to believe that the large

state enterprises and the huge tracts of land they had owned under Japanese rule would be distributed to the Taiwanese people and that there would be a significant movement towards even greater local autonomy and political self-determination. But it would be wrong to consider these beliefs as the embodiment of an incipient Chinese or Taiwanese nationalism. By the 1930s few Taiwanese believed that unification with China or independence were serious possibilities, and most were resigned to their fate as part of the Japanese empire, worrying only about the degree of autonomy Taiwan might expect, as well as overcoming the ethnic barriers instituted by the Japanese. Yet, as Fong Shiao-chian has shown, cultural identification of Taiwanese with Japan was only skin deep (Fong, 1993). With a few exceptions (Aborigines, in particular, had come to identify with the Japanese), the Taiwanese were quite happy to shed their Japanese identities as soon as they were once again under Chinese rule. But there was reason for people to believe that the modernist project which Colonialism had forcefully imposed upon them would continue; that the institutional norms which had been legitimated by Japanese nationalism would continue under a different brand name. Because the most apparent form of inequality under Japanese colonial rule was racially based, it seemed entirely likely that Chinese rulers would provide a fairer and more equitable form of rule.

These hopes did not last long. The KMT viewed Taiwan as an asset in the Chinese Civil War. They viewed the population with suspicion, considering them too Japanese,⁶ as well as potential Communist sympathizers. Not planning to stay in Taiwan for long, they were happy to allow officers and soldiers to plunder the local resources for the war effort as well as for their personal enrichment. The 30,000 soldiers who arrived in

the months after the Japanese surrender were paid very little, and were “were expected to fend for themselves on Formosa as they did on the mainland, and here they did very well” (Kerr, 1965: 98). From petty theft to wholesale plunder of Taiwan’s industrial legacy from the Japanese era, looting was the economic policy for the first years of KMT rule. Governor Chen Yi 陳儀 (*Chén Yi*) even dignified it with the title Necessary State Socialism (國家社會主義 *guójiā shèhuìzhūyì*) (Kerr, 1965: 97-98) Grain reserves, and even the island’s youth were appropriated for the war effort (1965: 104, 107). Rather than relief from the kind of war time expropriation of people and resources that the island’s population had endured under the Japanese, it soon looked only as if things would get worse.

It was only a matter of time before matters came to a head. In anticipation of the oncoming confrontation, Chen Yi sought to undermine the authority of the local elite by establishing an Anti-hoarding Campaign in which prominent local men were put in charge of rice-collection and then blamed for the shortages. Gangsters were brought over who “were used to incite riots and raids on private warehouses,” protected by a general amnesty “anyone who broke open private buildings and revealed hoarded stocks” (1965: 108).

the Governor's anti-hoarding campaign appears to have been one of his earliest moves to discredit and destroy the educated, middle class which had begun to emerge in the late years of the Japanese era. These were the gentry, small, independent landholders who also had modest investments in shops and small industries in the towns. They represented the articulate Opposition. The Nationalist Government, Party and Army were responsible for food shortages and the threatened crisis, but measures taken to cope with the situation were clearly designed to set Formosans one against another (1965: 109).

For the local elite, one of the most troubling developments was the matter of property which had been jointly owned between locals and Japanese. Under Japanese rule local businessmen had been forced to take on Japanese partners, now the KMT called this “collaboration with the enemy” and used these partnerships as an excuse to confiscate all such jointly held property (1965: 122). These were all confiscated by the government, either directly, or through financial trickery that tied up local assets in large denomination bills, only to declare a freeze on all assets in such large denominations (1965: 125).

All of Taiwan’s major industries were quickly reorganized either under the direct control of the state, or into companies owned by Chen Yi and his commissioners (1965: 139-40). The new Taiwanese government existed for the welfare of the mainland refugees:

In due course there were to be found on Formosa about 1600 generals, nearly 200 admirals and enough bureaucrats to govern the whole of mainland China. Room had to be made for all of them, and all had to be fed by the Formosan people (1965: 367).

Meanwhile, unemployment had become a grave problem for the once prosperous Taiwanese. Local industries which had once employed nearly 50,000 people could no longer support even 5,000 (1965: 141). While heavy taxes, corruption, looting, etc. are often mentioned as the precipitating causes of the February 28th uprising, it should be noted that it was in the beginning of February that Chen Yi announced his plans for the distribution of confiscated Japanese properties. Plans that clearly excluded the local elite (1965: 243-44).

Local frustrations exploded in an island wide rebellion on February 28, 1947. The reaction was swift, and brutal. With reinforcements from the mainland, the KMT brutally

crushed the rebellion, and began a systematic forty year campaign against the local elite, many of whom were killed, imprisoned, or simply “disappeared” in what is known as the White Terror.⁷ Martial law was established,⁸ and dissent was stifled. Elections were allowed on the local level to placate the Americans who renewed their support of the KMT in the wake of the Korean War, promoting Taiwan as a bastion of democracy against the onslaught of Communism (1965: 396), but the only opposition parties were those who had been officially sanctioned. It is arguable that these early elections helped pave the way for Taiwan’s eventual transition to democracy (see Chapter 6) but Taiwan was still far from living up to its “Free China” moniker.

Central to the maintenance of military rule was the KMT’s strict control over the local media. Starting in 1951 only the thirty one officially approved newspapers were granted permission to publish, with the number of sanctioned papers remaining fixed until 1988, after the lifting of martial law (Rigger, 1999: 73). Most radio and television stations were directly owned by the KMT (1999: 73-74).

As I have shown, the KMT was brutal in its suppression of the population’s desire for self determination, bloodily eliminating many of the local elite, restricting the expression of divergent opinions in politics or the media. This is important to keep in mind as we now turn to the ideological means by which the KMT sought to win popular consent, for no matter how brutal, no dictatorship can survive without some degree of legitimacy. Yet even its efforts to gain legitimacy were backed by a culture of fear: fear of the party, as well fear of the Communist “bandits,” against whom the KMT were ostensibly fighting long after the civil war had ended.

Defending Culture

While the fiction of democracy may have been important in maintaining the support of the United States, within Taiwan legitimacy was maintained by the notion that the Republic of China (ROC 中華民國 *Zhōnghuá mínguó*), in the body of the KMT party and its leaders, was the last bastion of “traditional Chinese culture.”

Traditional Chinese culture was ultimately a "political" culture in the general sense of embracing the entire polity and in the specific sense of representing the various institutions in power, that is the Nationalist government, Nationalist party ideology, a Nationalist community bound by a single language, history, and civilization. (Chun, 2000: 11)

The official ideology was embodied in the study Sun Yat-sen's 孫逸仙 (*Sūn Yìxiān*) *Three Principles of the People* (三民主義 *Sānmínzhǔyì*). This text “was not a formal treatise written by the author but a collection of essays compiled and edited posthumously, then credited to him” (Chun, 1994: 61). Perhaps even more important than Sun's contribution, for the application of his ideas to the creation of a national ideology, were “the two supplementary chapters on the principle of livelihood appended by Chiang Kaishek [蔣介石 (*Jiǎng Jièshí*)]” (1994: 61). These tied together political ideology and Confucian values, “narrowly defined” in terms of filial piety, which naturally extended toward the party and its leaders (1994: 63).

The education system was the central means of promoting this ideology. Starting in 1953, the national curriculum included textbooks on the *Three Principles of the People*, and “In 1968, the curriculum was revised more or less permanently, with courses at the elementary level focusing upon 'life and ethics' and courses at the secondary level

focusing upon 'citizenship and morality'" (1994: 63). This was embodied in the concept of Spiritual Education 精神教育 (*jīngshén jiàoyù*) which was aimed "not only to help bolster Taiwan's defenses in case of a PRC military attack, but also to protect young, impressionable students from falling prey to communism itself" (Strawn, 1999: 111). The military and cultural battle against Communist China were linked together through the introduction of military training into the schools. The importance of this program cannot be understated, Chiang Kai-shek's son, Chiang Ching-kuo 蔣經國 (*Jiǎng Jīngguó*) was the director of both the Youth Corps 中國青年救國團 (*Zhōngguó qīngnián jiùguótuán*) which was in charge of student military training (1999: 110). Within the schools a special position was created, that of the military training instructor (教官 *jiàoguān*).

These figures were on campus 24 hours a day, and were required to be KMT members. They taught military training class, made sure student obeyed rules about clothing and appearance, made sure daily rituals such as flag-raising went smoothly, and organized periodic military drill and song competitions. They were also expected to keep order in the schoolyard. Keeping order was part of protecting national security and included ... making sure students and school staff did not engage in treasonous or anti-KMT sentiment. (1999: 113).

After graduation from school, "Two years of mandatory military service for young men offered a venue for even more intensive indoctrination in the KMT's ideology and mission" (Rigger, 1999: 72). There was also moral education for the family and community through a variety of civic organizations, such as women's groups who handed out prizes to model citizens on national holidays (Chun, 1994: 58).

Historical Blocs under the KMT: Land Reform

The KMT's legitimacy rested not only on ideology and fear, but eventually on the tremendous success of Taiwan's economic development. However, the KMT's economic policies, especially those associated with land reform, served to bolster the status of the ruling historical bloc while undermining the powerful rural landowning class. It was only with Taiwan's transition to an export oriented economy in the seventies that this class would reemerge as a political power house. Nonetheless, while Taiwan remained poor throughout the fifties, reforms implemented during that time were to have a spectacular effect on Taiwan's later development, which was truly "miraculous" in both its depth and in the equitability of its effects:

Between 1960 and 1980, per capita GNP increased from US\$130 to US\$2,100. Taiwan's GNP growth rate from 1960 to 1982 averaged 8.4 percent per year. At the same time, income distribution remained relatively egalitarian⁹ (Rigger, 1999: 70)

Much of the credit for the Taiwan "miracle" goes to the successful implementation of land reform during the fifties (Gold, 1986, Krugman, 1994).¹⁰ While there is no doubt that land reform did help relieve class tensions, and stimulated the economy by moving wealthy landowners into the industrial sector, it is easy to make too much of land reform's impact on Taiwan's political economy. For one thing, as we have shown in our discussion of land ownership under the Qing (Chapter 3), and during the Japanese era (above), land reform was already relatively equitable before the imposition of reforms. While the existing system of tenant farming was tremendously exploitative, it was necessitated in part by the economic unfeasibility of the small plots of land owned by Taiwan's numerous landowners.

Prior to implementation of the “land to the Tiller” policy in June 1952, only 0.82% (5,051 households) of all households owing private farmland held over 10 chia (Bain, 1993: 30, n. 5)

So, when the Land-to-the-Tiller program was implemented in 1953, “the holdings of a vast number of small-scale landlords [were] redistributed to the tillers” (1993: 30). Before the reforms more than half (55%) of all farm households were comprised of tenants, accounting for 38% of all privately-owned farmland. After the reforms the percentage of tenant farming households was reduced to 26%, accounting for only 15% of privately-owned farmland (1993: 29). However, because of the large number of landowners who owned small plots of land¹¹, the recipients of the Land-to-the-Tiller program were stuck “operating uneconomic holdings”¹² (1993: 30). Moreover, officially these new owner-operators were actually still tenants, with the state as their landlord. Over the following ten years, “inflation and low agricultural prices” made it difficult for many farmers to repay (1993: 32). Was this as Bain states, citing Hill Gates (Gates, 1987: 50), “a deliberate policy to force impoverished workers off farms and into poorly-paid factory employment” (Bain, 1993: 34)? Perhaps not, Bain argues that there were real constraints “imposed by population density on the availability of land at that time” (Bain, 1993: 34). Nonetheless, this was the net effect of policies that failed to take these constraints into account.

The traditional model holds that payments to landlords allowed them to move out of unproductive agricultural work and become successful capitalist entrepreneurs. There is some truth to this, but the nature of the actual compensation offered to landlords must be taken into account. Bain argues that too much is made of the entrepreneurial successes

of a few landlords, arguing that they were the exception, not the rule (1993: 33). They were offered bonds and shares in state owned enterprises, many of which proved to be worthless:

A survey of landlords made following the rent reduction phase of land reform in 1949 ... suggests that commentators who recorded the successful transfer of landlord capital were generalizing from the experience of a few larger landlords. Village-level investigation during the 1960s into the effects of the reform caused one research to comment that: “Until the bond problem is solved the land reform will remain successful only on one side.... As to what actually happened it was rather unfair to the majority of landlords” (1993: 33)

The biggest problem was, as noted, very few of the landlords owned substantial amounts of land. Thus, their compensation was also negligible. But many of the state-owned enterprises in which they received shares were “economically unstable”

“I received a letter stating that the company was in financial difficulty and sought to solicit further support from me. I gave my shares to my sister as they were of no use to me” ... Many landlords throughout Taiwan liquidated their bonds (1993: 33)

Does this history support Gates’ contention “that the program was designed as much to destroy the emergent middle class ... as it was to aid the landless peasant” (Gates, 1996: 221; Kerr, 1965: 420)? Perhaps not, but it does seem to have that effect upon the large number of landlords who did not own substantial amounts of land.

Language policy after Retrocession

The promotion of Mandarin as the National Language

As we have seen, during the martial law years, the entire repressive apparatus of the state was largely devoted to enriching state coffers and repressing the development of the local

bourgeoisie. Large state enterprise was favored over the petty-commodity production engaged in by the native elites (Gates, 1996: 215). During these years, ethnic differences between Taiwanese and Mainlanders, divided society. Even Taiwanese who were successfully able to convincingly adopt the habitus of the Mainlander elite were “gently but incessantly reminded of [their] origins” (Gates, 1981: 254). In 1974, even though Mainlanders accounted for only 12 percent of the population, they accounted for nearly half (49 percent) of government officials and school employees (1981: 255).

Political repression during the martial law years was accompanied by cultural policies which simultaneously repressed local languages and cultures, as well as those associated with the Japanese era,¹³ and promoted a nationalist Chinese identity associated with the culture and history of mainland China and the Mandarin Chinese language. KMT party members and Chiang Kai-shek loyalists were granted all the positions of power in the new government, yet the legacy of Japanese technology and institutions forced them to rely heavily upon Japanese educated Taiwanese who could read existing technical manuals, government records, etc. (Gates, 1996: 212, 16). As late as the 1970s, very few of the Japanese era documents had been translated into Chinese (1996: 216, n. 3)! Such dependence, however, was kept relatively secret, as all vestiges of the Japanese language were officially banned from public discourse, newspapers, magazines and classrooms in 1946 (Friedman, 2002; Hsiau, 1997: 306). English language classes had also flourished during the period of transition between Japanese and KMT rule (Kerr, 1965: 206-07). Bombarded with U.S. propaganda during the last years of Japanese rule, the Taiwanese had every reason to expect the U.S. to put an end to military

rule and grant them greater local autonomy. There were even several small English language newspapers published during this period, encouraging people to study English (1965: 210-11). The KMT sought to undermine the growing desire for American-style democracy called for by American propaganda and local English-language publications alike (1965: 216,19). Accordingly, “Governor Chen's office began a campaign to undermine Formosan trust in the United States Government and people, and the United Nations”:

He therefore launched a new English-language journal, *the New Taiwan Monthly* with a dual purpose. It could be used as a vehicle for anti-American propaganda within Formosa, and it could be used abroad as a counterfoil to the popular *Formosan Youth Magazine* and *Liberty*. Since the new journal could be printed and circulated at Government expense, it could smother the struggling Formosan papers (1965: 225).

During the February 28 uprising it was reported that “anyone who spoke English reasonably well, or who had had close foreign connections, was being seized for ‘examination’” (1965: 300). The hunt for English speakers naturally excluded the KMT leadership, many of whom had been trained at English-medium Christian schools and colleges on the Mainland (Sommers, 2003). Scott Sommers has argued that KMT education policy, with its focus on grammar-and-translation style English language instruction and testing, deliberately sought to undermine the teaching of effective English language skills, even as many KMT elite continued to send their children for study abroad in the United States (2003).

Official KMT language policy came under the aegis of the “Taiwan Provincial Committee for the Promotion and Propagation of the National Language” (CPPNL 台灣省國語推行委員會 *Táiwānshěng guóyǔ tuīxíng wěiyuánhui*), established in 1946 (Tse,

1986: 25).¹⁴ The CPPNL set forth a six-point plan for the promotion of Mandarin (the new National Language):

(1) to recover the Taiwanese dialect so as to enable the public to learn the NL by comparison between the dialect and the NL; (2) to emphasize the standard pronunciation; (3) to eradicate the influence of Japanese as reflected in the daily speech of the people; (4) to promote the Contrastive study of morphology, so as to enrich the NL; (5) to adopt the National Phonetic Symbols so as to promote communication among people of different races and origins; (6) to encourage the intention of learning the NL so as to facilitate the teaching of it” (1986: 26).

Although the first point in the plan seems to suggest a tolerant and forward-thinking attitude towards local languages, the actual implementation of the plan was rigidly monolingual. (Hsiau, 1997: 306). All schooling was conducted in Mandarin, and in 1956 it was forbidden for students to speak local languages in school (1997: 307). Students were punished by corporal punishment, having to wear a hat or placard around their neck, and later by having to pay a fine (Huang, 1995: 57-58; Sandel, 2003: 530). Even those caught speaking their mother tongue off of school grounds were sometimes punished (informant, 2001). Moreover, television and radio programming in Hoklo was heavily regulated – limited to sixteen percent of broadcast time (Hsiau, 1997: 307). In the 1970s many popular “Taiwanese operas and puppet shows on television were forced to use Mandarin” (1997: 308). In addition to language instruction, the entire school curriculum emphasized a universal Chinese identity over local cultural and linguistic traditions. Students studied Sun Yat-sen’s nationalistic tract, the “‘Three Principles’ of the People,” for the college entrance examinations (Strawn, 1999), and geography lessons included the memorization of train stations in mainland China (Friedman, 2002).

The persistence of local languages under martial law

Despite rigid monolingualism, concentration of political (and pedagogic) power, and ethnic barriers which divided society, local language and culture still continued to survive throughout Taiwan. As we have seen, even though the use of Hoklo by the mass media was limited, it was not eliminated altogether. Moreover, it is important to remember that many of the two million Mainlanders who came over were male soldiers, who were either single, or permanently separated from their families. This meant that many of the Mainlanders married local women. That local women wanted to marry Mainlander men highlights the value ascribed to their cultural and political capital. In one study of 722 mixed marriages in Taipei, “nearly 92 percent were between mainlander men and Taiwanese women” (Gates, 1981: 266). Even though national identity cards used by the state defined ethnicity in terms of the father’s place of origin 籍貫 (*jíguàn*), the result of such intermarriages was that the second generation of Mainlanders included a large number of families with local roots on the mother’s side.

One of the major factors in the decline of local languages was the choice of many parents to speak to their children in Mandarin in order to ensure their success in school (Sandel, 2003: 533-34). But such choices were tied to families’ expectations about social mobility. Regional and class differences had important effects on the extent to which Mandarin was used. One study, conducted in the early 1980s shows that Mandarin accounted for 53 percent of the conversation observed in department stores in Taipei, but only 20 percent in the southern city of Tainan (Van Den Berg, 1986: 102). Even more striking is the difference between department stores in Taipei and the vegetable market,

where Mandarin only accounted for 19 percent of the conversation (Van Den Berg, 1986: 100)!

Indeed, Gates has convincingly argued that class divisions within local ethnic categories came, during this period, to be more important than divisions between the ethnic groups themselves. At the time of her study, 68 percent of the 500 most important business leaders in Taiwan were Taiwanese (Gates, 1981: 256). While the percentage of Mainlanders (32 percent) are still disproportionate to their numbers, the statistics show that a large number of Taiwanese were still able to succeed quite well under KMT rule, especially outside of the official domains of government agencies and education. One important caveat to this picture is the Aborigine population. With only 125 Aborigines in graduate school in 2001 (Government Information Office, 2003a), and only 23 Aborigines having obtained Ph.D.s since World War II (Wu, 2004), it is arguable that “the aborigines in Taiwan are the only group of people whose ethnic boundary coincides with a class boundary” (Chao and Johnson, 2000: 170). For Austronesian languages the martial law period was far more damaging, as forced dislocations, migration, intermarriage, etc. affected impoverished Aborigine populations far more than it did the speakers of local Chinese languages (see Chapter 5). At the same time however, this was also a period of extensive missionary activity, which entailed an important linguistic component, with missionaries (both Catholic and Protestant) producing religious texts (in some cases having to invent new orthographies for this purpose) in Austronesian languages (Stainton, 1995: 156-57) (Wang, 1995). Although the government tried to suppress the production of native language bibles, such interventions were sporadic and

of limited effectiveness (Stainton, 1995: 156). As had been the case during the Japanese era, assimilationist policies were in some ways most effective amongst the Aborigine population, with the exception that those Aborigines who had learned Japanese. In fact, many Aborigines continued to use Japanese in Church, for it was only in that language that many were literate: “A newspaper report on 1984 reports in shocked tones that some evangelists even go so far as to use Japanese Bibles in the church” (1995: 105)!

The Iron Ballot Block: Local Institutions Under the KMT

That the political concessions of the Japanese years continued to shape the political relations of the KMT era is best demonstrated by the continued importance of two interrelated institutions: local elections and farmers’ associations. The utility of these institutions for controlling the ambitions of the local elites were clear to the KMT, who allowed elections for local and regional posts early on, even as they continued to ban opposition parties. In addition to co-opting the local elite into a system in which they had little power, elections served to prop up the legitimacy of Taiwan on the international stage, where its allies liked to refer to it as “Free China” (Rigger, 1999: 81).

Shelly Rigger has argued that form of local elections the KMT adopted from the Japanese was particularly well suited for the KMT’s purposes, she calls it “the colonial era’s most significant political legacy” (1999: 39). Referred to by its acronym SVMM, which stands for “single, nontransferable voting in multi-member districts,” the Taiwanese voting system promoted both clientelistic cooperation and competition for limited resources. This is because SVMM is not a winner-take all system in which only

one candidate can win an election. Instead, all the candidates are “ranked according to the number of votes each receives, and those with the largest number of votes, up to the district magnitude, are elected” (1999: 39-40). Because there is no redistribution of votes, candidates only need as many votes as are necessary to win a place amongst the winners, and any extra votes above that number are wasted. This problem of “wasted” votes requires party members to work together to allocate the proper proportion of votes to each candidate. This was often done with the help of a local political operator known in Hoklo as *tiau-a-ka* 柱仔腳 (pillars) (1999: 42). As a result, “it is possible to win many Taiwanese elections merely by capturing the votes of people to whom one is personally connected, or to whom one's close followers are connected” (1999: 43). Because all tax revenue is distributed by the central government, and then redistributed to the community through the municipal government, the entire system encourages the formation of clientelistic chains in which local candidates are supported in exchange for favorable government contracts (1999: 42).

The SVMM voting system resulted in the creation of local factions who compete for patronage by promising their votes to a given candidate. Factions are an entirely local phenomenon, their power never extending beyond a particular county or city (1999: 84). The KMT leadership rewarded the factions for their loyalty by rarely choosing “candidates from outside the local factional milieu,” but at the same time sought to limit the power of any individual faction by alternating between local factions each term (Bosco, 1994: 134; Dickson, 1996: 96; Rigger, 1999: 85). Up until the late 1980s, factions were forbidden from forming “vertical or horizontal alliances,” and if any faction

leader succeeded in gaining a position in the national government, they “had to cut of their ties with factional followers” (Kuo, 2000: 95).

The other colonial legacy at the local level were farmer’s associations. As we saw, these were originally set up by the Japanese in order to balance the emerging power of local landowners (see Chapter 4). Under the KMT these organizations became even more important, serving the state by collecting “rice as payment for fertilizer, taxes and land purchased under the Land Reform Program,” as well as being able to choose which farmers could “participate in pilot programs” such as growing “profitable export crops,” not to mention overseeing local construction project and bureaucracies which offered the “possibility of patronage employment” (Rigger, 1999: 79). Especially profitable was (and still is) the association’s credit department which oversee sizable loans (1999: 79; Tsai, 2002b). Because of their tremendous power at the local level, Farmer’s associations developed close relations with local factions:

Local factions benefited especially from certain national regulations concerning loans that did not apply to the credit departments of the agricultural associations. Local factions were in an excellent position to take advantage of the discrepancies between interest rates and loan terms offered by banks and those offered by the farmers' associations. At the county-city level, the state gave local factions ownership of various natural monopoly businesses, such as bus transportation systems, credit cooperative banks, and natural gas corporations. The state also set aside some positions in the local administrative system for local factions to feed their political networks. (Shiau, 1996: 217)

It is not surprising then to learn that in 1970, “the Farmers’ Association was involved in 84 percent of townships experiencing factional strife” (Rigger, 1999: 79-80). Yet whatever tensions may have existed at the local level, until the end of Martial Law, all factions and all of the Farmers’ Associations were firmly in the control of the KMT.

Along with public employees and soldiers, these local groups were considered to be one of the KMT's "Iron Ballot" constituencies (1999: 141). As Shelly Rigger informs us, out of all of these groups, only one group was truly independent of the KMT's local "mobilizational networks": "independent entrepreneurs" (1999: 141). And even they could often be co-opted by the *tiau-a-ka* (1999: 141).

By the 1980s this system started to fall apart. Taiwan's economic success began to affect the careful controls by which the KMT had managed to limit the impact of local factions at the national level. A surge in real estate values around this time made it possible to get rich quick through land speculation, or what was referred to locally as "frying land" 炒地皮 (*chǎodìpí*) (Chin, 2003: 145). As the financial stakes in local elections became higher, more and more money was spent trying to secure votes, which were now often sold to the highest bidder. As the links between politics and business grew stronger it was no longer possible to prevent factions from expanding outside of their district, especially as they "no longer wholly relied on KMT-sponsored local business opportunities," but were developing independent business networks of their own (2003: 145). It is not surprising that many Taiwanese associate democratization with the introduction of Black Gold 黑金 (*hēijīn*) politics, or corruption.

many local factions recruited gangsters into their networks, thus transforming the nature of their organizations. The gangsters recklessly got involved in fighting for pillars, vote buying, and establishing entry barriers so that opponents could not campaign in their areas ... Nowadays, according to several subjects I interviewed, there is a good chance that city and county councilors affiliated with local factions are either *heidao* [黑道 (*hēidào*)] members or on familiar terms with the underworld. (2003: 145)

As political reforms opened up the political process, factions became even more important to secure votes in an increasingly competitive environment. In the 1992 legislative elections, “fifty-nine percent of KMT nominees had connections to local factions,” more than ever before, and “another third of the ruling party's candidates were sponsored by the military” (Rigger, 1999: 165). Political reform served to more closely ally the KMT with its Iron Ballot constituents than ever before.

Reforming Taiwanese Politics

Against a background of structural changes threatening the legitimacy of the KMT, such as the recognition of the PRC by the United States, and the changing power relations undermining the KMT's control of local factions, the KMT also had to shoulder the burden of internal power struggles over the succession of Chiang Ching-kuo to his father's post when Chiang Kai-shek died in 1975. Not all members of the KMT old-guard were pleased with the idea of Chiang Ching-kuo assuming leadership of the party. It is reasonable to assume that at least some of the reforms implemented by the younger Chiang were intended to secure his position within a party dominated by elderly cadres from the mainland (Dickson, 1996: 48). Chiang revitalized the KMT leadership, bringing in leaders who were more educated and who had strong local ties, many of them native born Taiwanese (1996: 53).

At the provincial level, cadres with a college education increased from 53.4 percent to 76.7 percent; at the county level from 38 percent to 64.9 percent; and among district-level cadres, from 40.2 percent to 85.3 percent. (1996: 55)

Taiwanese were only slowly allowed into the central party bureaucracy, but there was an immediate jump in the number of Taiwanese holding district level positions in the KMT.

In 1955, only 78 of 360 district secretaries (21.7 percent) and 385 of 883 district level cadres (43.6 percent including both secretaries and aids) were Taiwanese... As a result of Taiwanization, the proportion of Taiwanese among district cadres rose to 56.6 percent in 1975 and to 73.3 percent in 1985 ... (1996: 54-55)

Even as Chiang Ching-kuo continued the policies of the White Terror, there was a more lenient attitude towards certain forms of dissent, especially the reform oriented opposition journals. In the 1970s these journals were still banned, but rather than arresting the editors, the publishers were punished financially, and Journals were able to get around bans by re-opening under “slightly different names” (Rigger, 1999: 25).

Chiang Ching-kuo also sought to limit the growing influence of money politics which had strengthened local factions and given them increased independence from the KMT as new sources of non-government revenue became available to them from prominent businessmen. In the mid 1980s, Chiang Ching-kuo was able to punish politicians implicated in a scandal involving the Cathay Plastic group, one of Taiwan’s largest companies (Shiau, 1996: 219). The situation would change radically in just a few years when, under the leadership of Chiang Ching-kuo’s hand-picked successor, the Taiwanese born Lee Teng-hui, Finance minister Wang Chien-shuan 王建瑄 (*Wángjiànxiūn*) was forced to resign after proposing a popular “tax reform bill that would control land speculation and tax windfall profits” (Chu and Lin, 1996: 89).

Wang's departure was immediately followed by that of another nonmainstream cabinet member, Chao Shao-kang [趙少康 (Zhào Shàokāng)], who complained that as head of the Environmental Protection Agency, his tough stance on environmental protection polices was

undermined by influential businesspeople close to the president. (1996: 89)

Chiang oversaw Taiwan during a transition period, when military rule allowed for internal reform of the party by recruiting a new generation of local technocrats to top-level positions while still reigning in the power of local factions. But these same reforms would eventually undermine that balance, increasingly transforming the KMT “from a coalition of a mainlander state elite and collateral native politicians to one of socioeconomically conservative state elites, local factions, and big business” (1996: 88).

The Revolt of the Iron Ballot Bloc

One of the most remarkable phenomenon associated with the rise of identity and issue based protest politics in the late 1980s is the that of the 17 movements described by eminent the Taiwanese sociologist Hsin-Huang Michael Hsiao (Hsiao, 1990), at least four are groups that were traditionally thought of as members of the KMT’s Iron Ballot constituency: Aborigines, Hakkas, workers, and farmers. More than any other indicator, this revolt revealed the crisis facing the KMT, and the historical bloc which had maintained the status quo for the past three decades.

The Aborigine Human Rights Promotion Association 台灣原住民權利促進會 (*Táiwān Yuánzhùmín quánlì cùjìnhuì*), established in 1983, was started by the educated Aborigine elite, many of whom had close ties to the Presbyterian Church (see Chapter 5) (Hsiao, 1990: 169). In addition to land related issues, one of the rallying cries of this movement was a change in how Aborigines were referred to in government documents and in textbooks

On anthropological advice, they created the new pan-ethnic name 'Aborigines' (*Yuanzhumin* [原住民]), that was supposed to replace the government-term 'mountain compatriots' and the commonly used terms 'savages' and 'mountain people', and defined a set of symbols and special rights that should apply to all Taiwanese Aborigines equally, including rights on ancestral land, use of vernacular languages in schools, revitalization of individual Aborigine names as well as autonomous cultural and political institutions. (Rudolph, 2002)

The DPP gave these new Aborigine elites strong support, urging them on in their desire to replace those Aborigines who had been complicit in the KMT's assimilationist policies (2002). Their political protests received widespread support throughout the population; however, due to lack of strong grassroots support among the Aborigines themselves, they were unable to unseat the established KMT backed Aborigine leaders in the 1989 elections (2002).

The Hakkas were another ethnic group who had long been closely allied with the KMT, and yet in December of 1988 over thirteen thousand Hakkas marched in Taipei in what is known as the Return My Mother Tongue movement 還我母語運動 (*huán wǒ mǔyǔ yùndòng*) (Huang, 1995: 59). "They asked for increased Hakka language programs on radio and television" (Hsiao, 1990: 176). At the time only one television company was allowed to air programming in Hakka, and this was restricted to a 30 minute news segment broadcast once a week, early Sunday morning (Ryan, 2004). Moreover, native language programming on the radio, also severely restricted, was scheduled to be decreased over time. The march resulted in the eventual lifting of restrictions as well as the emergence of a lasting political movement based on Hakka identity politics.

The DPP has never particularly been a pro-labor party, especially considering its strong ties to the entrepreneurial class, and as employees either directly of the state, or of

state-owned companies, most workers have traditionally been strongly supportive of the KMT; however, in 1986 two DPP candidates were voted into office with strong labor support. Hsin-Huang Michael Hsiao sees this not so much as a result of any ties between the DPP and labor, but simply reflecting the growing autonomy of labor as a result of the breakdown of the traditional system of alliances (Hsiao, 1990: 171-72). The KMT quickly responded “by establishing a new Labour Commission in the central government” (1990: 171). Labor unrest also came from a different sector of society – teachers. The Teacher’s Rights Promotion Association 教師人權促進會 (*Jiàoshī rēnquán cùjìn huì*) was founded by some high school teachers in 1987 and quickly grew into a nation-wide movement, with support from the academic elite (1990: 173-74). One of the central issues was the policing of teachers for ideological purity and the presence of *jiaoguan*, or military training instructors, within the schools. University professors also sought greater “input into administrative policy-making” (1990: 173-74).

None of these movements shocked the establishment as much as the riots of May 1988, which was one of the most dramatic outbreaks of public violence in recent Taiwanese history. What made it so shocking was that the protest was organized by farmers, a group whom had long been regarded as the bedrock of the KMT’s Iron Ballot” coalition.

Protests were mobilized through Associations of Farmers’ Rights established around the island by a faction of the fledgling opposition Democratic Progressive Party.¹⁵ In the capital, a kilometer-long procession of 2,000 protesters sought redress of the grievances first from the Legislative Yüan and then from KMT Party headquarters. They called for universal farmer insurance, lower fertilizer prices, increased government rice purchase, reversion of the Farmers’ and Irrigation Associations to farmer control, establishment of a Ministry of Agriculture

and liberalization of agricultural land transfer. All grievances were of long-standing. Receiving no official response and barred by police, the crowd vented its frustration by tearing down the Legislative Yüan name-board and smashing windows. Violence escalated throughout the night and by dawn approximately 200 protesters and police had been injured and over 100 marchers arrested. (Bain, 1993: 1)

As a result of these protests, Lee Teng-hui, whose dissertation *Intersectoral Capital Flows in the Economic Development of Taiwan, 1895-1960*, had been on Taiwan's agricultural economy (Lee, 1968), was picked to chair the Council on Agricultural Development 農委會 (*Nóngwěihui*). The government soon implemented “a province-wide farmer insurance scheme” and made changes to allow farmers' associations greater autonomy from the state (Hsiao, 1990: 172-73).

Conclusion

KMT rule was both a continuation of the Japanese era and a radical break with it. In many ways the breaks are easier to see than the continuities: Japanese was replaced with Mandarin as the official language. Emperor worship was replaced with Sun Yat-sen's *Three Principles of the People*. And, perhaps most importantly, the new state was legitimated by an appeal to a shared Chinese culture. Yet the two-tiered ethnic system of the Japanese era continued with the Mainlanders replacing the Japanese in all the most favorable jobs and government positions. The suppression of local linguistic and cultural expression was perhaps even stronger than it had been under the Japanese (with the exception of the few years that the Kominka movement was at its height). Even land reform, one of the most profound changes of the early KMT years can arguably be seen as a continuation of the tensions that had existed since the late Qing, which had

developed a large, powerful, and fairly equitable rural gentry class, and an even larger population of tenant labor. The Japanese had simply formalized this arrangement, and under the KMT the state, rather than the gentry became the landlord with large numbers of farmers still cultivating uneconomic plots.

The continuity can be seen in terms of the development of local language markets. Local languages continued to be used in the markets and in much of the more rural areas of the country. There even emerged, at the end of this era, a nativist literature which glorified the rapidly disappearing rural lifestyle (see Chapter 6). Despite this continuity, however, long term trends slowly were to have their effect. The existence of a strong centralized education system was the most effective means the KMT had of promoting the official language and the official ideology. An entire generation of parents spoke to their children in Mandarin to ensure their success at school. (Many Taiwanese remarked to me that their parents used their native language as a secret code between each other when they did not wish the children to understand, although, of course, some did.) Only with democratic reforms in the 1980s would this system begin to unwind. The motivation for these reforms is discussed in Chapter 6, but first, it is important to look at the separate history of Aborigines during this early period. Under the Japanese this population had been largely separated from the rest of the island, and it was only during the KMT years that they were integrated into the population as a whole. Unfortunately, this integration would be into the lowest rungs of society.

Notes

¹ See Chapter 2 for explanation of ethnic and linguistic terms, and charts on language distribution.

²The latter figure includes 290 girls (Heylen, 2001: 137).

³“The pronunciation resembled the Zhangzhou pronunciation, rather than the Quanzhou variant of Southern Min. Tomita Akira has explained that this was because of the location of the Education Bureau and the Taiwanese contributors, such as Ke Qiujié and Chen Taoying who were from the region. One other explanation is that the compilers of textbooks relied on the rhyming glossary and the missionary works, which were in the Zhangzhou pronunciation” (Heylen, 2001: 143). In either case, it is likely that this contributed to the standardization of local Hoklo pronunciation.

⁴ The end of the imperial examination system in Mainland China, in 1905, also served to reduce the importance placed on Classical Chinese education (Heylen, 2001: 282).

⁵ See Chapter 2 for a more detailed discussion of Gramsci’s theory of corruption.

⁶ Of course, the KMT leaders themselves had close relations and had continued to do business with the Japanese throughout the war (Kerr, 1965: 53-54)

⁷ According to Hung-mao Tien, "An estimated ten thousand cases involving civilians were decided in military trials from 1950 to 1986" (Rigger, 1999: 71).

⁸ “Martial law first went into effect in mainland China in 1934. It was extended to Taiwan in 1949 and enshrined in law in 1950. The job of implementing martial law fell to the Taiwan Garrison Command (TGC), a branch of the military” (Rigger, 1999: 70).

⁹ “The GINI Index averaged 0.298 during these years” (Rigger, 1999: 70).

¹⁰ Land reform came in three stages: the Sale of Public lands 公地放領 (*gōngdì fàng lǐng*) in 1949, the Rent Reduction Program 三七五減租 (*sānqīwǔ jiǎnzū*) of 1951, and the Land-to-the-Tiller program of 1953 耕者有其田 (*gēngzhě yǒu qí tián*). Only the last one is discussed here. The sale of public lands was “a farce” since “the KMT was not about to give up one of its most valuable resources, especially after it had successfully quashed dissent in the wake of the 1947 uprising” (Bain, 1993: 26). And while the Rent Reduction Act made an immediate and important difference in the quality of life for

Taiwan's tenant farmers, "The cuts in profits, together with the knowledge that more radical land reform programs were in the offing, caused many landlords to start selling their land ... In some cases, even forcing their tenants to buy land they could ill afford" (Gallin, 1966: 96).

¹¹ "While it is true that many landowners hid the true extent of their holdings by registering under the names of relatives, Bain argues that this is 'not sufficient to explain the small number of landlords recorded as having large holdings'" (Bain, 1993: 30, n. 5)

¹² "A JCRR survey in 1954 'revealed many discouraging problems', among which was the uneconomic size of holding (JCRR 1954 in 1965:91). Of some 790,000 landowners in June 1955, 73% owned less than 1 ha, 18% between 1 and 2 ha, 5% owned 2-3 ha and only 4% more than 3 ha (JCRR 1955 in 1965:106). JCRR considered that purchasers operating less than 1 ha could 'not be expected to make both ends meet'" (JCRR 1954 in 1965:85). (Bain, 1993: 33-34)

¹³ During the February 28th, 1947 uprising, when the opposition gained control of the radio station, announcements were made in Japanese.

¹⁴ Taiwan was officially considered to be a "province" of China, rather than synonymous with the entire country. This fiction resulted in a certain amount of redundancy in the government, with both National and Provincial governments governing the same island.

¹⁵ While Bain states that the movement was mobilized by the DPP, Michael Hsiao insists that the "protest was a spontaneous one initiated and organized by farmers themselves" (Hsiao, 1990: 172)

CHAPTER 5

LOCAL CULTURE, GLOBAL LANGUAGES

Historically, the relative illegibility to outsiders of some urban neighborhoods ... has provided a vital margin of political safety from control by outside elites. A simple way of determining whether this margin exists is to ask if an outsider would have needed a local guide (a native tracker) in order to find her way successfully. If the answer is yes, then the community or terrain in question enjoys at least a small measure of insulation from outside intrusion. (Scott, 1998: 54)

Globalization vs Localism

Although Taipei is not lacking in small, twisting, side streets, the overall layout of the city is the height of the type of modernist panoptic (Foucault, 1979: 195-228) transparency associated with the creation of modern cities, such as Haussmann's Paris (Scott, 1998: 73). This is a legacy of the Japanese colonial era, when the walls of the old city were torn down and large thoroughfares were laid out on a grid (Allen, 2000). Under the KMT era, the street names were renamed after cities and regions of China, as well as historic events and moral values associated with the official Chinese nationalism promoted by the KMT. The streets were even provided with Romanized transliterations for foreigners who cannot read the Chinese characters. Yet, despite the presence of transliterations, and streets laid out along a modernist grid, Taipei retains a degree of "relative illegibility to outsiders" which Scott argues is a necessary to provide "a vital margin of political safety from control by outside elites" (Scott, 1998: 54). This can be seen most clearly by the one street with an English derived name: Roosevelt Road, one of

Taipei's main streets. Any attempt by an American tourist to query most Taiwanese about the location of "Roosevelt Road" will result in blank stares. The American pronunciation sounds little like the Chinese, 羅斯福路 (*Luósīfú lù*) written above it on the street sign. It is exactly this sort of confusion which the Harvard educated KMT mayor of Taipei, Ma Ying-jeou 馬英九 (*Mǎ Yīngjiǔ*) wishes to eliminate. Accordingly, he has implemented two changes. The first is to replace the idiosyncratic Taipei Postal System 郵政式拼音 (*Yóuzhèngshì Pīnyīn*) orthography used on street signs with the international standard, Hanyu Pinyin 漢語拼音 (*hànyǔ pīnyīn*). The second is to provide the main thoroughfares with numbered names, such as "1st Avenue" which will be posted alongside the existing street names. Ma's goal is to make Taipei an "international city", attracting global investment and tourism.

Ma's moves embracing globalization are different than those taken by his predecessor, current President Chen Shui-bian. As mayor of Taipei, Chen implemented a phonetic system unique to Taiwan, the Tongyong Pinyin 通用拼音 (*tōngyòng pīnyīn*) system. While similar to Hanyu Pinyin, there is enough difference that it would take a few hours training to become familiar with Tongyong before someone lacking Chinese literacy could correctly read a street sign. Of course, no orthographic reading of the street signs would ever be completely sufficient, since the lack of diacritical marks in the implementation of both systems means that critical phonological information is missing. But the symbolism of choosing a system which is close to the international standard, but sufficiently "Taiwanese" to confuse a visitor is a clear statement of the ambiguity of the

DPP's stance towards globalization. Similarly, in 1996, (then) mayor Chen renamed Chiehshou Road 介壽路 (*Jièshòu lù*), so named in honor of Chiang Kai-shek's birthday (it means "long life" and is short for "Wishing a long life to Chiang Kai-shek on his Birthday" 紀念蔣介石壽誕的介壽路 *Jìniàn Jiǎng Jièshí shòudàn de Jièshòu lù*), "Ketagalan Boulevard" 凱達格蘭達道 (*Kǎidá gé lán dà dào*) after the Aborigine ethnic group located in the Taipei region (Lu, 2003b). But there is an important difference between the indigenization symbolized by naming Taipei streets after local Aborigine groups, and the adoption of a uniquely Taiwanese form of Chinese orthography. The former fits with the concentric circle conception of national identity adopted in 1990 at the National Affairs Conference (NAC, discussed in Chapter 2), while the latter openly challenges it by viewing the integration of Taiwan into the global sphere as taking place independently of the Chinese cultural sphere, rather than nested safely within it like a set of Russian dolls.

The current situation in Taiwan is very fragile, globalization, as well as political pressure from Beijing continually pushes Taiwan toward greater and greater integration with mainland China, Taiwan's largest trading partner (Huang and Schuman, 2004). At the same time, Hoklo ethnic nationalism can never fully reveal itself without danger of backlash, forcing nationalist elements to at least give lip service to localism and multiculturalism. Moreover, while the DPP gives lip service to "Taiwanese independence" sentiments, it is precisely their economic base, owners of SMEs, who are most actively engaged in the export-oriented economy which is pushing Taiwan closer to the mainland. Cultural policy serves to mask these realities rather than as a surrogate for

them. And not just any aspect of cultural policy, but language policy in particular. For no other aspect of Taiwanese cultural policy so clearly links Taiwan to the rest of the world than the languages Taiwanese are required, or encouraged to learn.

Outside of its political context, it hardly makes sense for Taiwan to be having a debate over orthography. Most Taiwanese I met are fairly inept at using the orthographies they studied in grade school, since once basic Chinese literacy is mastered, most Taiwanese rely upon Chinese characters alone. While it is possible to buy dictionaries organized orthographically, most Taiwanese adults use dictionaries arranged by frequently repeated components of characters called “radicals” 部首 (*bù shǒu*) as well as the number of strokes following the radical. Orthography is used only for four purposes: First, to teach basic literacy to children in primary school. Second, for maps and road signs throughout Taiwan, targeted at foreigners who cannot read the characters. Third, on official documents, such as passports. In the same category I would group academic databases which can sometimes be searched orthographically instead of with characters. And, fourth, occasionally used with obscure characters (for instance, in proper names) to clarify the pronunciation. As I will discuss below, until recently, Taiwan used different orthographic systems for the first and fourth use than they do for the second and third. It was only when the target audience was foreigners that the Latin alphabet was used. It is probably for this reason that foreigners observe so many inaccurate spellings. But it is also because orthography is the tie between Taiwan and the non-Chinese speaking world that it is such an important issue politically. In terms of Pierce’s semiotics,

orthography is an “indexical” sign (Irvine, 1989: 251), in that its use of the Western alphabet serves to also make it a symbol of Taiwan’s relationship to the global sphere.

After discussing the current orthographic debate in more detail, I turn my attention to an even more explicit example of Taiwan’s linguistic link to the rest of the world: English language education policy in Taiwan. In fact, one of the main motivations for switching from the current orthography used in schools to Tongyong Pinyin is that it will better prepare students to study English. The status of English as a global language has led to its displacing Chinese as the most valued form of linguistic capital in Taiwan, one that in the classic Bourdieuan sense is directly translatable into other forms of capital, such as pay raises for employees who pass standard business English exams. In the sphere of English education the positions of Ma and Chen are similar to those on orthography, with Ma wholeheartedly embracing English as a means to modernization and globalization, and Chen remaining more ambivalent. For the DPP English is an issue closely associated with the class aspirations of middle class Taiwanese, and the policy seems to be as much devoted to creating a more equitable distribution of linguistic capital as it is to promoting English education per se. This is most clearly seen in the closing of private bilingual kindergartens under the new government.

The Phonetic Debate

The decision of the DPP led government, in 2002, to adopt the Tongyong Pinyin system as Taiwan’s official orthography for representing Mandarin, Hoklo and Hakka is one of the most politically controversial decisions of the past decade (Luo, 2003: 49). Tongyong

Pinyin replaced two standards which had previously co-existed in Taiwan. Where the orthography functioned as a transliteration system targeted at a non-Chinese audience, such as on maps, passports, and street signs, Postal System Pinyin was used. This system was put into effect in 1906 at the Imperial Postal Joint-Session Conference 帝國郵電聯席會議 (*dìguó yóu-diàn liánxí huìyì*) in Shanghai, and is based on the Wade-Giles system which was standardized in 1892 and remained the international standard for Chinese orthography until 1979 (Wikipedia contributors, 2004a; Wikipedia contributors, 2004b).¹ The Postal System Pinyin differs from Wade-Giles in the absence of diacritics, and the acceptance of spellings and pronunciations historically in use in the Western world (e.g. Peking for Beijing) (Wikipedia contributors, 2004a). This system, however, was not the one used in Taiwanese schools when teaching Mandarin. The ROC government had developed the National Phonetic Alphabet 國音字母 (*guóyīn zìmǔ*) as part of its effort to standardize Chinese pronunciation, and had introduced it to schools in 1920 (Heylen, 2001: 326). Commonly referred to as Zhuyin Fuhao 注音符號 (*zhùyīn fúhào*), these symbols are based on a unique shorthand script developed by the scholar Zhang Binglin 章炳麟 (*Zhāng Bǐnglín*) and do not look at all like the Roman alphabet (e.g. ㄅ, ㄆ, ㄇ, ㄉ) (Wikipedia contributors, 2004d). In fact, they bear a striking resemblance to Japanese *katakana* 片仮名 (e.g. ワ, ヌ, コ, ヒ), which developed around the same time, but was not officially adopted by Japan until after World War II (Wikipedia contributors, 2004h). Zhang Binglin lived in Japan for a while, where he met Sun Yat-sen (Wikipedia contributors, 2004e). The anti-colonial feelings of the early ROC

government certainly influenced the decision to choose a non-Roman orthography, but the necessity of communication required the use of the Roman letter based Postal System Pinyin.

There had been several previous attempts to establish a new official orthography for Taiwan, most notably Mandarin Phonetic Symbols II 國語注音符號第二式 (MPS II, *Guóyǔ zhùyīn fúhào dìèrshì*), established in 1986, but its use remained limited to official government publications (Wikipedia contributors, 2004f). MPS II retains many of the characteristics of Zhuyin Fuhao, but uses the Roman alphabet. Outside of Taiwan, Wade-Giles had remained popular but, by 1979, the International Organization for Standardization (ISO) adopted the Chinese orthography which had been used in the PRC since 1958, Hanyu Pinyin (Wikipedia contributors, 2004g). This system soon became the standard for teaching Chinese to non-native speakers, and was eventually adopted by the U.S. Library of Congress in 2000 (Luo, 2003: 49; Wikipedia contributors, 2004h).

It was in this context that Yu Bor-chuan 余伯泉 (*Yú Bóquán*), a professor at the Institute of Ethnology 民族學研究所 (*mínzúxué yánjiùsuǒ*) at Academia Sinica 中央研究院 (Zhōngyāng Yánjiūyuàn), Taiwan's premier research institute, has long been closely associated with the DPP. At the end of the current president's, Chen Shui-bian, tenure as mayor of Taipei (1994-1998) he began implementing Yu's Tongyong system on street signs (Sui Noi, 2000). So it was not a big surprise that the DPP would seek to promote Tongyong Pinyin with Chen as president. However, when the Minister of Education Ovid Tzeng 曾志朗 (*Zēng Zhilǎng*), a professional linguist, decided to reject

the advice of an advisory council that he adopt Tongyong Pinyin, it created a national scandal (Lin, 2000), and led to his being replaced after the next election (Tsai, 2002a).

Supporters of Tongyong Pinyin over Hanyu Pinyin, assert that the system better utilizes Roman letters to represent Mandarin phonology; but, as Luo Jing points out: “Phonetic accuracy is not an essential concern with respect to a phonological system” (Luo, 2003: 58). Rather, the primary appeal of Tongyong is clearly ideological: First, it claims to be able to represent all of Taiwan’s Chinese languages. There were attempts to use it for Austronesian languages as well, but these have been largely abandoned in favor of either the system developed by developed by Paul Jen-kuei Li 李壬癸 (*Lǐ Rénguì*), a professor of linguistics at Academia Sinica specializing in Austronesian languages as well as, in some cases, Church romanization already in use in some communities. What this means, when the same symbols have different phonological values in each system is not entirely clear. Presumably there is some advantage to minimizing differences between orthographies, especially for learning purposes; however, it is more likely that the concept of such a unified system serves the political purpose of promoting a unified Taiwanese identity which is distinct from that of Mainland China. This interpretation is bolstered by the second claim made by Tongyong Pinyin supporters, namely that it is 85 percent similar to Hanyu Pinyin (Staff, 2002).² This claim seems to support Tsai Chih-hao’s assertion that Tongyong Pinyin is “best described as an attempt to achieve internationalization without adopting hanyu pinyin” (Tsai, 2004).

Most ordinary Taiwanese I spoke with over my three years in Taiwan, including teachers, academics, and young professionals, were not particularly concerned about the

orthography debate. Educators were mostly concerned that the Ministry of Education pick *a* standard, so that they could plan accordingly. Some expressed dismay at the cost of reprinting textbooks and street signs every time the government changed its mind. However, the story remains politically controversial. An important reason for this is that the process of decentralization to the local level, one of the concessions won by the DPP when they were an opposition party, now works against them as the ruling party. Decisions about which system to use for street signs remain the decision of local governments, and Taipei's KMT Mayor, Ma Ying-jeou, has stuck with his decision to use Hanyu Pinyin instead of Tongyong Pinyin for Taipei's street signs (Huang, 2002). The use of Hanyu Pinyin, together with alternative names in English, is part of Ma's vision of Taipei as an "international city," but it dovetails with traditional KMT advocacy of eventual re-unification with mainland China. Other municipalities, such as TaiChong and HsinChu 台中 (*Táizhōng*) 新竹 (*Xīnzhú*) have also adopted Hanyu Pinyin, resulting in a patchwork of various orthographic systems throughout Taiwan.

In an article on orthographic debates in Haiti, Bambi Schieffelin and Rachelle Doucet write:

Why is the issue of the kreyòl orthography so important to Haitians? The matter is not simply whether to write, for example, the kreyòl word for bread (*pɛ̃ /*) with *e* (*pen*) or *i* (*pin*) or *ain* (*pain*) like in French *pain*. The underlying issue is about representations of self ("Haitianness") and the representations of the nation. (Schieffelin and Doucet, 1994)

Clearly the decision as to whether to represent the initial sound in the word for heart 心 (*xīn*) [ㄍ] with an *x* (Hanyu Pinyin) or a *si* (Tongyong Pinyin), is equally about Taiwanese representations of self and nation. Since the compromise of 1990 NAC, a policy of

localism has served to incorporate local elites into the state, finesse ethnic relations between Mainlanders and Taiwanese, and allow for limited ethnic nationalism without angering China. However, Tongyong pinyin is important because it represents an effort to define the local *in opposition to* the concept of a greater China, rather than as nested neatly within it. However, the compromises made in 1990 also led to the decentralization of state power over cultural norms. In order to promote Tongyong Pinyin the DPP must enforce rules at the national level, overriding local preferences. Moreover, integration into the global economy has made international norms, such as ISO endorsed Hanyu Pinyin of greater importance. As of Taiwan's entry into the WTO in 2001, Mainland publishers are now able to compete directly with local publishers. The adoption of Tongyong Pinyin is an effort to smooth Taiwan's integration into this global marketplace, while still retaining a unique identity, but because it goes against the hegemonic concept of identity agreed upon in 1990, it is very threatening to the Mainlander elite. It remains to be seen if the introduction of Tongyong Pinyin as the national standard marks the beginning of the end of the current historical bloc, or simply a renegotiation of the terms of the alliance.

English, the Global Language

One of the most practical reasons for adopting Tongyong Pinyin is to facilitate the study of English. By having students learn Chinese literacy using a Roman orthography, they will already be familiar with the symbols when learning English later on (Yu Bor-chuan, personal communication, 2001). As I discussed above, Zhuyin Fuhao, which was used

until 2001 to teach basic Chinese literacy, was deliberately designed around non-Western symbols. This shift in orientation, from East to West, comes at a time when Chinese hegemony in the region is beginning to eclipse that of the West (Perlez, 2004). But it also reflects changing class relations within Taiwan. Higher education was for a long time the provenance of only a select few. In the 1970s there were only 13 public and 19 private institutions in Taiwan, a number which, by 2001 had grown to “57 universities, 78 independent colleges, and 19 junior colleges” (Government Information Office, 2003a). The reason for this growth is, in part, the fact that so many Taiwanese were driven overseas to receive higher education. Despite Taiwan’s small population, up until the 1987-1988 school year Taiwan was the number one source of foreign students at American universities, at which point it was overtaken by China (now India is number one) (Institute of International Education, 2004). That year was also the year that martial law was lifted, and the beginning of educational reforms opening up alternatives within Taiwan. But, as I discuss below, English education has been highly politicized since the first years of KMT rule.

One of the consequences of Chiang Ching-kuo’s efforts to increase the number of cadres who had advanced degrees was a marked increase in the number of government officials who had studied abroad in the United States. In Taiwan I often heard the joke that more members of Taiwan’s Legislative Yuan had Ph.D.s from American universities than did members of Congress! While a humorous exaggeration, it does reflect on the importance that American education had for members of Taiwan’s elite, and by extension, on the importance of learning English. And not just for the KMT, for during the White

Terror, many prominent Taiwanese intellectuals went abroad as well. During the 60s and 70s Taiwanese politics was played out in the United States as much as in Taiwan.³ Yet during this same period, English education for the majority of Taiwanese reached new lows (Sedlak, 1976: 60).

From the 1970s onwards, Taiwan's students consistently scored lower on the English sub-section of the JCEE than they did in most other subjects (Sedlak, 1976: 60; Wang, 1996), directly affecting their chances of gaining access to higher education.

The vast majority of students, taking the 1974 JCEE as an example, scored lower than 50 out of 100 for the English section. Just the opposite is true in Chinese literature, for which the mean score is around 70, or in the *Three Principles of the People*, for which the mean score is around 80. (Sedlak, 1976: 60)

The curriculum established in 1972, and in effect through the early 80s, introduced English education in middle school for two or three hours per week. The number of hours was extended during the third year to between four and six, but English became an elective (Chen, 2003: 64). This situation led many parents to seek alternative means to improve their children's English scores. These strategies include: bilingual kindergartens, after-school attendance at cram-schools, or *bushiban* 補習班 (*búxibān*), and even receiving primary education abroad in the United States.

David Crystal has referred to English as a “global language” (Crystal, 1997), and there is no doubt that Taiwan’s shift towards an export-oriented economy in the seventies significantly increased the importance of English education. Chen Su-chiao argues that at this time “English became a tool to evaluate one's competence in the job market due to its instrumental value in science, technology, commerce and modernity” (Chen, 2003: 103).

English is closely associated with competence at work and with modernity in the minds of most Taiwanese. It is even used in evaluating pay raises – seemingly proving Bourdieu’s dictum that linguistic capital can be exchanged for real capital (Bourdieu, 1977: 659); however, what is less clear is whether or not the competence of most Taiwanese workers *actually* depends upon their English ability. University students do need to be literate in English to read the latest texts in certain specialized fields which have not yet been translated into Chinese, and people directly involved in international trade need to master “business English” (Jones and Alexander, 2003), but most Taiwanese are actually able to do quite well without English, at least as far as work is concerned.

The spread of English is not uniform throughout Taiwan. English is far more important in urban areas, especially Taipei, than it is in rural ones (Chen, 2003: 77-93). In 1993, the Taipei government began implementing English language education as an elective in the fifth grade, and as of 1998 it has been required starting in the third grade (2003: 163). Competition began between municipalities, with others offering it a year or two earlier than Taipei, while some rural areas decided against any English education in primary school (2003: 103). Efforts to equalize English education throughout the country with the introduction of English in the third grade in the new 9-year Curriculum failed since Taipei then changed its policy to introduce English even earlier, in the first grade (2003: 164).

An even greater problem than the inequality between urban and rural areas is that within the same school between students who receive additional English training outside

of school, having perhaps attended a bilingual kindergarten, or who attend *bushiban* classes, and those who do not. This results in tremendous disparities within the classroom, and makes it difficult to implement a uniform curriculum for all the students. The government has responded with a number of initiatives designed to lessen dependence on private schooling, both by beginning an initiative to hire large numbers of native speakers to teach in the school system, and most recently by attempting to ban bilingual kindergartens altogether. The reliance on native speakers as teachers seems to be a uniquely East Asian phenomenon (Sommers, 2001), moreover it is one that does not have a particularly good track record of success, but Taiwanese parents have come to expect it for their children because of the widespread use of native teachers in the *bushiban*. Both of these actions have been widely seen as part of the general politicization of language education over the past two decades.

Taipei Mayor Ma Ying-jeou has sought to bring greater prestige to Taipei by establishing it as an “International City,” and a central part of his plan is to make Taipei more accessible to English speaking visitors. The city’s rapid transit system already makes stop announcements in “English” (in quotes since many of the stops are actually Chinese names pronounced as an English speaker with no knowledge of Chinese might guess the pronunciation), as well as Mandarin, Hoklo and Hakka. Mayor Ma has introduced a plan to provide a secondary naming system for the city’s main streets which would provide them with English names, such as “1st Avenue” in addition to their existing Chinese names, to make it easier for foreigners to navigate (Diedrichs, 2000). Finally, he has also implemented a plan to teach English to people “from all walks of

life” including “taxi drivers, hotel and restaurant attendants, ticket sellers and sales persons at scenic or recreation areas, police officers, and phone operators” (Chen, 2003: 164). The national government has since implemented a similar plan, which will eventually be expanded to include English lessons in community centers throughout Taiwan (Chen, 2003: 165). The parallels between this plan and Japanese era language programs aimed at adult language learners (see Chapter 4) is quite striking, and probably not accidental, although they differ in that English is a second language, meant primarily for communication with foreign visitors, rather than the official national language.

In August of 2004, the Ministry of Education announced that it would no longer allow the operation of bilingual kindergartens (Sommers, 2004a). Bilingual kindergartens in Taiwan are not bilingual in native language and Mandarin, but in Mandarin and English, the two most valued languages in Taiwan’s scholastic market. The question is why would the DPP led government seek to limit access to private English education? Part of the answer can be found in a study done by Scott Sommers, who found that Taiwan’s foreign English teachers (mostly Canadians, Americans, and South Africans), are heavily concentrated in Taiwan’s wealthy urban professional neighborhoods and are almost exclusively in Taiwan’s three largest cities (Sommers, 2004b). Sommers points out the irony of the fact that the law being used by the DPP led government to close bilingual kindergartens is precisely the same law that establishes Mandarin, rather than Hoklo, as the only official language used for education (Sommers, 2004a). It is possible, as Sommers seems to suggest, that this is a political strategy to essentially blackmail Taiwan’s elite into allowing a more flexible language policy in Taiwan’s schools.

Another explanation might be that the DPP, to gain support of Taiwan's rural population and middle classes, are seeking to end the exclusive monopoly on English linguistic capital held by Taiwan's elite. Another DPP sponsored plan involves bringing native English speaking foreign teachers into Taiwan's schools on a massive scale which would (symbolically, at least) end the exclusive access to such teachers (Sommers, 2004c).

Conclusion

The spread of English is often discussed in terms of "imperialism" (Phillipson, 1992), and clearly its present dominance as a "global language" (Crystal, 1997) owes much to both British and American colonialism, as well as to America's cultural hegemony in the age of globalization. However, just as economic theories of dependency (Amin, 1973) and globalization (Appadurai, 1996) tend to overstate the importance of the colonial metropole, and understate the importance of individual nation-states in shaping economic relations (Weiss, 1997), so too do theories of linguistic imperialism and globalization tend to overlook the importance of nation-states in shaping their own linguistic markets. Political economic approaches to the study of language policy, such as that of James Tollefson (Tollefson, 1993), rectify this situation by placing the focus squarely on the study of local power relations. However, I believe that Tollefson moves too far in the other direction. By equating language status with the status of elite groups he both overlooks the important relations between groups within the society, as well as the ways in which national and global ideologies interact.

Before the Spring 2004 presidential elections in Taiwan, a group of intellectuals, activists, and artists, including the renowned filmmaker Hou Hsiao-Hsien 侯孝賢 (*Hóu Xiàoxián*), formed the Alliance for Ethnic Equality 族群平等行動聯盟 (*zúqún píngděng xíngdòng liánméng*) to protest what they saw as the polarization of ethnic identity by DPP supporters of Chen Shui-bian's reelection. In an interview published in the *New Left Review*, four members of the alliance expressed their concerns about raising ethnic tensions (Hou et al., 2004). Writer Tang Nuo 唐諾 (*Tángnuò*), explained why they had started the group:

No guesswork was needed to anticipate that ethnic conflict would be whipped up again this time. It happened in each previous election, so we had a lot of experience of this. Chen Shui-bian, running for re-election as president, was at quite some disadvantage when the campaign started, and he supposedly represents the Minnan [Hoklo], the largest ethnic group in Taiwan. It could only benefit him if the issue of ethnicity became a major election topic, so it could be expected he would make a lot of play of it. In fact, it looked as if this might be the most serious case of identity politics ever in Taiwanese elections. (Hou et al., 2004: 19)

It is not surprising that several members of the Alliance have Mainlander, Hakka, or leftist roots.⁴ The former feel excluded by Hoklo nationalism, while the latter feel betrayed by the emphasis on ethnic rather than social issues.

That the DPP leadership is seeking to promote Taiwanese nationalism over localism is suggested by some other recent developments. Most notably, a small storm erupted in 2003 when some questions on the national civil service examination 公務人員考試 (*gōngwù rényuán kǎoshì*) appeared in Hoklo (Ko, 2004). Leading Hakka lawmakers strongly criticized the inclusion of these questions on the exam (Chen, 2004),

and in September of 2004 the Examination Yuan 考試院 (*kǎoshìyuàn*), the body in charge of determining the content of the examinations, declared that exam content would not be in Hakka, Hoklo, or the Austronesian languages (Ko, 2004). This of course left Mandarin as the official language of the exams without explicitly declaring it as such (Editorial Board, 2004). The English language paper of one of Taiwan's largest newspaper chains editorialized,

So what language is to be used for exams? Well, the very one which almost no native used in Taiwan until it was imposed upon Taiwanese by their foreign overlords in 1945 and ruthlessly promoted during the decades of colonial government that followed -- namely, Mandarin Chinese. So amid efforts to raise a national consciousness, exams for the civil service must be taken in the language of Taiwan's former oppressors and current enemies. It is hard to think of anything more crass. (2004)

The level of vehemence, on both sides, sparked by this decision was further aggravated when the head of the civil service exam committee announced in October that he would change the “civil service exams to test applicants on the history and geography of Taiwan only,” removing questions about mainland China (Staff, 2004).

Hou Hsiao-hsien worries about this trend:

Since we have Chen as president, a chairman of a meeting may give a speech in Minnan [Hoklo]. If anyone in the audience questions this, he will be upset. But no-one has decided to make Minnan the official language of the island yet. Such confusions now arise everywhere. For example, Minnan has suddenly appeared in the examinations for the civil service. But most applicants cannot understand it, since Taiwan has now experienced quite a lengthy period of economic growth and urbanization, producing a new social mixture in the cities. Mandarin has been taught in our schools for a long time, but now all of a sudden Minnan is required in national exams, with questions people often cannot understand, let alone answer. In this sense, so-called localization is simply Minnanization, excluding everything else. This is a programme of 'de-Sinicization', as some of its supporters term it, which continuously appears in each domain,

and arouses strong repugnance. Since it got under way, we have had a more or less serious sense of being threatened. (Hou et al., 2004: 21)

Hou's comments elide an important difference between localization and Taiwanese nationalism. Localization was implemented under KMT rule, and many of the policies implemented during the first term of Chen Shui-bien's presidency were simply the continuation of KMT policies that had been agreed upon earlier. Of course, these policies were a response to widespread anti-KMT sentiment sparked by the opposition movements of the 1970s and 80s, but as I argued in the preceding chapters, the policy of localization served to enhance the status of the native elite within the KMT by offering new ways to cement their client-patron relationship with their traditional base, through the construction of local cultural tourism, community centers, etc. The ideology underlying this campaign was one in which Taiwanese identity was seen as a series of concentric circles radiating outwards from the local community to encompass, first Taiwan, then the larger Chinese cultural sphere, and finally the world. But the DPP wants to break that alliance by opposing the ideology of localization with a more strident Taiwanese nationalism rooted in Hoklo cultural identity. The primary means of doing this is to challenge the concentric circle model of identity with one in which Taiwanese identity is not embedded within the Chinese cultural sphere, but exists on equal terms with it inside the larger global sphere. It is for this reason that the question of eventual "unification" with the PRC remains such an important part of Taiwanese politics. There can be no doubt that external pressure from the PRC has been an important factor, but many Taiwanese believe that it is, in fact, local politics which keeps the unification question on the national agenda. As Tang Nuo says,

When Lee Teng-hui took over as the first Taiwanese president, the opposition lost much of its *raison d'être* because an islander was already in power. From that time on, the 'ethnic' question started to change character, in a dynamic culminating in the 2004 presidential election. It was no longer an opposition between islanders and mainlanders, but between Taiwan and the CCP [Chinese Communist Party] in Beijing. Nationalism increasingly became a convenient way of avoiding social realities, problems in the economy, education and culture. It was also, of course, the best instrument for battling against the KMT. (Hou et al., 2004: 22)

It is too early to tell whether or not the DPP can rule without the support of some of those KMT Iron Ballot Bloc constituents who came over to bring them to power, including the Hakka and Aborigine groups. What little support the DPP had managed to win amongst Aborigines was severely threatened when Vice President Annette Lu 呂秀蓮 (*Lǚ Xiùlián*) called for moving typhoon victims from Taiwan's mountain regions (most of whom are Aborigine) to Central America in order "to give them a new start," a message she later repeated even after criticism (Lin, 2004).

The current situation in Taiwan is very fragile, globalization, as well as political pressure from Beijing continually pushes Taiwan toward greater and greater integration with mainland China, Taiwan's largest trading partner (Huang and Schuman, 2004). At the same time, Hoklo ethnic nationalism can never fully reveal itself without danger of backlash, forcing nationalist elements to at least give lip service to localism and multiculturalism. Moreover, while the DPP gives lip service to "Taiwanese independence" sentiments, it is precisely their economic base, owners of SMEs, who are most actively engaged in the export-oriented economy which is pushing Taiwan closer to the mainland. Cultural policy serves to mask these realities rather than as a surrogate for them. And not just any aspect of cultural policy, but language policy in particular. For no

other aspect of Taiwanese cultural policy so clearly links Taiwan to the rest of the world than the languages Taiwanese are required, or encouraged to learn.

Notes

¹ Herbert Giles standardized his system in his *A Chinese-English Dictionary* 華英字典 (*Huá-Yīng zìdiǎn*), published in Shanghai in 1892, and in London in 1912 (Wikipedia contributors, 2004c). His system was in turn based on earlier work by Thomas Wade done in the mid-19th Century (Wikipedia contributors, 2004b).

² Tsai has pointed out that while there may be only a 10% difference between the orthographies, when combined into word forms, these differences have a huge impact, resulting in “48.84% of the 111,415 word types had different spellings” (Tsai, 2004)

³ For instance, broke out between pro-KMT and opposition supporters at little league baseball games in Williamsport, Connecticut in 1969, 70, and 71 (Morris, 2004:183-185).

⁴ Hou Hsiao-Hsien refers to himself as a “mainland Hakka,” a Hakka family who came over in 1947 (Hou et al., 2004: 29), the novelist Chu Tien-hsin’s mother is Hakka, and architecture professor Hisa Chu-joe calls himself a “leftist” (2004: 32).

CHAPTER 6

THE POLITICAL ECONOMY OF ABORIGINE ETHNICITY: LAND, LANGUAGE,
EDUCATION AND THE STATE IN TAIWANESE HISTORY

Aborigine Ethnic Formation

In Chapter 3 I discussed the history of Taiwanese ethnic formation, looking at how the Aborigines on the western plains had either assimilated and intermarried with the Han Chinese migrant population who arrived in the seventeenth and eighteenth centuries, or else had migrated to the East. I also, following Harrell (Harrell, 1990), argued that a unified Hoklo ethnic identity emerged after years of factional violence once the system of land ownership crystallized and elites turned their attention from vying for power at the local level to currying favor with the state bureaucracy. Another factor in the decline of factional violence was, beginning at the end of the nineteenth century, a concerted effort to colonize the remaining Aborigine lands in the mountains and on the remote East coast. Before discussing, in Chapter 7, the fieldwork I conducted in a small, rural, predominantly Aborigine village in Eastern Taiwan, it is first necessary to explain the unique history of Taiwan's mountain regions and the East coast. Because these were the last regions to be penetrated by the state, and the most recent to be colonized by Han Chinese, the history of this region is significantly different from that of the rest of Taiwan. More importantly, there were significant differences between how each of these regions (the mountains and the eastern plains) were colonized, resulting in differences in how mountain and plains Aborigines were integrated into the state.

I argue that these historical differences between the mountains and the eastern plains account for some of the ethnic differences observable between mountain and plains aborigines. Specifically, during the Japanese era, policies towards both land and education differed radically in each region. Mountain Aborigines were moved off land which was required for camphor cultivation, and were educated at police outposts, while plains Aborigines had long owned and cultivated land, and were sometimes even able to attend public schools. Both groups suffered from the development and opening up of the region during the KMT era, when new roads and new policies resulted in significant losses of land. Despite these hardships, deprived of alternative sources of social power, Aborigines remained closely tied to the state in both eras. As discussed in Chapter 4, they remain an important part of the KMT's political power base. In this chapter I trace their alliance with the state to the Japanese era, but also show how Christianity has offered Aborigines an alternative to embracing official nationalism.

The link between land and education in Taiwanese history, referred to in the subtitle of this chapter, is crucial for my argument. State policy towards Aborigines has been both policy towards the land owned by Aborigines as well as policy towards the Aborigines themselves. It is precisely differences in both land and education policy that have shaped the unique histories of Mountain and Plains Aborigines. Moreover, it is because of land policies that a third category of Aborigines, the Ping-pu or Plains Aborigines¹ 平埔族 (*Píngpǔzú*) of the West coast, ceased to be (at least as far as the state is concerned) a separate ethnic group a hundred years ago. Unlike the west coast, where the state remained fairly hands-off in its policy towards land ownership and

settlement, in the east coast and mountain areas, tremendous economic and military resources were expended on the settlement of Aborigine territory. This chapter starts with the beginning of state interest in these areas, and ends in the 1950s and 60s when the region began to take on its current ethnic and geographic configuration under KMT supported development and settlement of the region.

The Mudanshe Incident

Before 1874, most attempts by Han Chinese to settle in the Rift Valley ended in disaster. Disease and Aborigine hostility ensured that only a few small settlements were able to survive, and these only around the coastal ports of what are now present day Hualian and Taitung. One group of settlers were only able to survive by working as laborers for the Amis in Xiugulan 秀姑巒 (*Xiùgūluán*) (Thorne, 1997: 97). All that was changed in 1874, when an international incident brought this remote region to the attention of the top officials of the Qing dynasty. Three years earlier an Okinawan boat had sunk off the shore of southeast Taiwan. When the sailors came ashore at the Aborigine village of Mudanshe 牡丹社 (*Mǔdānshè*), they came into conflict with the local Aborigines, who killed 54 sailors. Japan responded by sending a force of 3,000 soldiers to occupy the east coast of Taiwan, supposedly to punish the Aborigines responsible for the killings, although it is likely that the Japanese were already interested in acquiring a territory that would protect their important trade routes. “Only after China signed a treaty agreeing to compensate both the families of the Okinawan victims for the deaths and Japan for the cost of its military expedition did Japan withdraw its troops at the end of October 1874”

(Chou, 1991: 13). This was a wake up call, leading to a full scale transformation of Qing policy towards Taiwan as well as towards the Aborigine territories.

Before 1874, the Qing had sought to prevent Aborigine unrest by limiting contact between Chinese and Aborigines. During the early years of Qing rule the local administration, often in response to rebellions, routinely ordered surveys of the boundary between Han and Aborigine settlement, as well as the construction of huge earthen walls to mark the limits of permissible Han settlement (Shepherd, 1993: 16-18). Each time the surveys simply acknowledged the previous boundary transgressions as a *fait accompli*, and did little to halt future movement across the boundary. Accordingly, when settlers did seek to move into Aborigine territory, they did so without any official support from the state (Harrell, 1990: 113). After Mudanshe, however, all that changed towards a policy of military occupation and official support of Han settlement in the Aborigine territories.

With the support of troops from the mainland, the Rift Valley was forcibly opened up. Three overland trails were opened up through the mountains to the west coast, and garrisons were established in stone forts “to promote settlement in the areas where the roads emerged from the mountains.” Han Chinese were offered a package of inducements (including draft animals, agricultural implements, and a three year exemption on taxation) to further encourage them to settle in the area (Thorne, 1997: 29). Fountainhead Primary School was built on the site of one such a fort, guarding the entrance to a mountain trail used during the Qing era.

The attempt by the Qing to settle the region was not entirely successful. Over the next twenty years (in 1877, 1878, 1888, and 1895) there were a series of Aborigine

uprisings against Qing rule in the Rift Valley. Many of these started with action by one Aborigine village from one ethnic group, but often grew to involve many different Aborigine groups, and even the Hakka. The Qing attempted to reward “compliant” villages by offering them seed and agricultural training. Such villages would appoint a village leader, or “toumu” 頭目 (*tóumù*, *tomok* in Amis), who would be responsible to the state for the behavior of the village, and village men would have to cut their hair in the Qing style. After suppressing the third rebellion in 1888, which required naval forces to be sent from the mainland, these chiefs were taken on a tour of the large Han cities of the east coast and the mainland in order to impress upon them the power of the Qing. By the end of the period the Amis were seen as slowly becoming Sinicized, and were even used to help fight against the Toroko and Bunun who were still raiding from the mountains (Thorne, 1997: 111-13).

Tension between the plains dwelling Amis, Paiwan 排灣族 (*Páiwānzú*), and Puyuma 卑南族 (*Bēinánzú*) on the one hand, and the mountain dwelling Bunun and Truku 太魯閣族 (*Tàilǔgézú*) on the other was exacerbated when, in 1885, Taiwan became a full province and was placed under the command of “an aggressive governor with a military background, Liu Ming-ch’uan” (Shepherd, 1993: 360). Central to Liu’s rule was a policy of “entering the mountains to rule the aborigines” (Harrell, 1990: 118). This policy was similar to the one that had been established a decade earlier in the Rift Valley, in that it used forced military occupation to open up Aborigine territories to settlers. However, it was different in two important respects: First, in addition to Qing

military forces, the mountain campaigns also involved local Han Chinese militias. Liu was thus able to channel the communal violence that had riven the increasingly overpopulated immigrant communities on the west coast against a common enemy (see Chapter 3). Secondly, while early Dutch expeditions had failed to find gold on the east coast, the camphor trees that grew in Taiwan's mountains were almost as valuable as gold, especially since it was a key ingredient in celluloid, a commercial plastic invented in 1870 (Stainton, 1995: 86), in addition to a host of other cosmetic, pharmaceutical, and military uses (it was used in gunpowder) (Richardson, 1972: 104). Liu hoped to use the state camphor monopoly to help fund his expensive reforms. "During the years 1891-95 Taiwan exported 30% more camphor than all of the rest of the world" (Thorne, 1997: 125).

The net effect of Liu's mountain campaigns was to push the Bunun and Truku Aborigines further into the Rift Valley, exacerbating tensions between Aborigine groups who had a history of mutual antagonism. Liu's economic reforms also affected the Ping-pu Aborigines on the west coast, accelerating a process which would lead towards the elimination of Ping-pu designation altogether.

Land ownership in Qing Taiwan was divided between "large-rent" owners and "small-rent" owners. Although the large-rent owner was the official owner of the land, it was the small-rent owner who actually had power over the land and who profited from it. Some large rent owners were absentee landlords who had financed the settlement of the land as an investment. Others, however, were Ping-pu Aborigines who sold the rights to farm the land in exchange for cash and technical knowledge. Many such Aborigine

large-rent holders had already lost all rights to their land in exchange for continued loans from the small-rent holder (Chen, 1999: 138-39; Harrell, 1990: 117). Under Liu, who desperately needed cash to fund his ambitious modernization of Taiwan, this system was reformed. Whereas before only the large-rent holder had paid taxes, now the burden was shifted to the small-rent holder. This was advantageous because large-rent holders had often been unwilling to register land that they would have to pay taxes on, and a new land survey served to quadruple the area of land that was taxed by the government. But to compensate the small-rent holder for their greatly increased tax burden, Liu lowered their rents to the large-rent holder. Although Han Chinese absentee land owners were relieved at their lower tax burden under the new system, Aborigine large-rent owners had previously been exempt from paying taxes, so the changes meant “a direct reduction in plains aborigine incomes” (Shepherd, 1993: 361). When even these reduced rents were eliminated by the Japanese in 1904, “the only legal distinction between Pingpu and other Taiwanese disappeared, and there was no instrumental reason for the assimilated Pingpus to maintain a separate ethnic identity” (Stainton, 1995). The Pingpu Aborigines were to cease to be a distinct ethnic group in the eyes of the state until the category was revived by identity based political movements in the 1980s.

Aborigine Education under the Qing

When the Qing army forced open the Rift Valley to settlers in the wake of the Mudanshe incident, they put forth an ambitious proposal to assimilate the Aborigines. An Aborigine who had fully assimilated was referred to by the term Guihua 歸化 (*guīhuà*), a term

which “which at the same time describes the process of enculturation and the status of those being enculturated” (Martin, 1994: 47). Assimilation meant education, and plans were made to open forty-four schools on the east coast, although only seven were ever opened, and most were closed within ten years due to poor attendance. The curriculum at these schools included the 1875 textbook, *Proverbs for the Instruction of Savages* 訓番俚言 (*xùnfānlǐyán*) and focused on Confucian morality and language instruction. The schools seem to have had some success, for, according to reports at the time, “after two years in these schools the majority of students could speak the [Hoklo] dialect” (Thorne, 1997: 114-115).

The emphasis on Confucian morality is consistent with Qing educational policies towards indigenous peoples elsewhere in the empire. In this respect Qing education served many of the same functions as did missionary work during the earlier Dutch period. Like the Dutch, the Qing were concerned about promoting “household proprietorship of agricultural land” which was seen as a basic feature, not only of morality, but also of “civil law” as well as “fiscal accountability” (see Chapter 3, Rowe, 1994: 425). However, the Qing lacked an independent clergy devoted to such missionary activities. Nor was there any state funding for public education. “Rather, periodic campaigns to set up schools were launched either by the few vigorous reforming officials or in reconstruction efforts following major disturbances when lack of education was always identified as contributing to social disorder” (Shepherd, 1993: 373). Accordingly, funding for Aborigine schooling was especially forthcoming after major rebellions or

after pacifying new territory, such as the east coast, and it was rarely continued after things had quieted down.

The same pattern had been established in Taiwan over a hundred and fifty years earlier, when forty-eight schools were established in Aborigine areas in 1735, after the suppression of 1731 Dajiaxi Rebellion 大甲西社番亂 (*Dàjiǎxīshè fānlùn*). As with the schools established in the Rift Valley, these schools were “to instill in the aborigines Chinese values and concepts of moral and social order” (Martin, 1994: 47). And it would be repeated again when Liu entered the mountains at the end of the nineteenth century. He established schools which would:

“Gradually instill filial piety, brotherly harmony, loyalty, honesty, propriety, righteousness, modesty, and shame, as well as (the senses of) utility, community well-being and rules in order to restrain savage hearts and bring about control of the self.” (1994: 51)

Was all this exposure to Confucian values successful? In the plains at least, there is some evidence that it was. When a group of Aborigine villages signed a compact to settle the P'u-li basin in 1823, they used “Confucian terms” to express “their loyalty to the Confucian state” as well as to “complain bitterly of their treatment by Han settlers” (Shepherd, 1993: 382). They were thus able to use the official discourse to petition the state to recognize their claims for the territory. Moreover, there are records of Aborigine women being honored for remaining widows in the Chinese fashion, and of Aborigines keeping “Chinese-style ancestor tablets and god statues” in their homes (1993: 383,385).

It seems that efforts at sinicization were more successful on the west coast. Not only because of the much longer period of contact with Han Chinese, but also because the education that the Ping-pu Aborigines received was modeled directly upon that of the

community schools in the villages: “As was customary, it began with the Trimetrical Classic and the Thousand-Character Classic and then proceeded to the Sacred Edict and the Four Books. Emphasis was at first on character recognition and calligraphy and then on recitation and memorization of the texts” (1993: 372). Still, it was not enough to compete in the examination system with the children of officials who frequently hired private tutors or ran private schools for their lineage (Elman, 2000). In order to ensure that this did not create resentment amongst the Aborigine elite the Qing found other ways to reward failed candidates for the exams:

From this time it became customary to include among the *i sheng* (ritualists) aborigine students who failed to obtain the *sheng yüan* degree. The *i sheng* served as musicians and performers in the solemn ceremonies school temples conducted each spring and autumn to honor Confucius; among their privileges was exemption from labor service. (Shepherd, 1993: 374)²

But there was always some tension between Aborigine and Confucian social values. Even when they adopted Chinese surnames, it was often done in a very non-Chinese way, such as the adoption of Chinese surnames, which were then transmitted matrilineally, or changed at will (1993: 384). Moreover, it seems that the marginalized position of plains Aborigines made them receptive to nineteenth century Christian missionaries who came to the island in the 1870s, leading to mass conversions to Christianity (1993: 382). The Protestant Mission had arrived in 1865, and by 1886 there were 1,584 adult members among the plains Aborigines on the west coast (Richardson, 1972: 33).

The Rift Valley in the Japanese Era

Early attempts by the Japanese to settle the Rift Valley in 1906 failed, but government sponsored development soon made the region much more accessible. By the early thirties, three thousand Japanese had settled into three villages, at a cost to the Japanese government of nearly ¥5,000 per family (at a time when that much money could have bought roughly eight hectares of irrigated paddy land on the east coast). Much of this expense was due to the disaster-prone nature of the Rift Valley which is home to regular typhoons, floods, and earthquakes (Salter, 1970: 64).

During this same period, large numbers of Han Chinese were encouraged to move into the region with the opening of two large sugar factories. The first, near Taitung, was built in 1913, and the second in the north was built in 1920 (Salter, 1970: 65; Thorne, 1997: 113). The Taitung Exploitation Corporation was established in 1920 with the goal of bringing in 1,300 settlers within the next four years. These settlers entered into contracts with the sugar corporation which guaranteed the factories a steady supply of raw materials and the farmers a guaranteed market for their produce, as well as technical assistance and fertilizer. The settlers were also expected to take part in military campaigns against the Aborigines (Salter, 1970: 64-65).

Most of the military campaigns were against the Mountain Aborigines, but Japanese land policies also caused friction with the Amis. The Japanese had declared that all land not under cultivation was officially state property (Stainton, 1995: 95). Because much of the land that had belonged to the Amis during the Qing era had not been converted to paddy land, and because there existed no written documentation to prove it

belonged to the Amis, much of it was taken by the state. Even though the Japanese had offered the Amis a chance to register their land starting in 1915, many Amis were reluctant to do so because it would then require them to pay taxes on the newly registered land (Stainton, 1995: 95-96; Thorne, 1997: 130).

While settlers were coming from Japan and the west coast, the Japanese were also forcibly moving mountain Aborigines into the area along the outer edges of the Central Mountain Range, which included the periphery of the Rift Valley.

Between 1903 and 1939 some 23% of the total Aborigine population moved. Since Pangcah³ formed the largest single Aborigine group, and since they were relatively unaffected by forced removal, the percentage of the mountain population which was displaced must have been very much higher (Thorne, 1997: 129, n. 79).

There had long been conflict between the Plains and Mountain Aborigines, and the forced contact between the two groups exacerbated these tensions. Moreover, the newly settled Mountain Aborigines did not take well to wet-rice agriculture (1997: 129). This transition was deeply disruptive to the entire social organization of the Bunun, since it introduced the concept of private ownership of land, thus undermining traditional patrilineal relationships (Stainton, 1995: 100).

Goto Shimpei 後藤新平, who held the post of civilian administrator from 1898 to 1906, held a social Darwinian view of ethnic relations, but he opposed those who believed that the Aborigines should simply be placed in a “a permanent reservation for them ‘until they died out.’” Instead, he argued that gradual assimilation was possible. Indeed, he did create a large reservation⁴, one which occupied almost half of the island, but he also set up an assimilation program to train young Aborigines (Thorne, 1997:

123-124). However, just five years after Goto's departure, his gradualist policies were overturned in favor of a more aggressive military intervention that would allow for state and private companies to profit from the exploitation of both the forests (for camphor) and "possible mineral wealth" in the Aborigine territory (1997: 125). By 1915, resistance in all but 122 mountain Aborigine villages had been squashed. The long war had cost the Japanese colonial forces nearly 10,000 lives, while an untold number of Aborigine lives were lost through both warfare and starvation (1997: 126-127).

Aborigine Education Under the Japanese

Even as the Japanese violently incorporated the Mountain Aborigines into the state, the manner of their inclusion served only to heighten differences between them and the Han Chinese, not to mention the Plains Aborigines in the East. The Mountain Aborigines were taught at police stations around the guard line that kept them out of the region where Hakka workers were growing camphor. Police were the primary contact Aborigines had with the Japanese state, and the police fulfilled many important administrative functions. In 1931, over 5,000 patrolmen (nearly half of the entire police force) were stationed in Aborigine areas, most of these were Chinese guards (*keitei*) who did not have the same status as Japanese policemen (Chen, 1984: 229).

Police run schools in Aborigine areas were still rather insignificant before the war. For the most part they did little more than teach the Japanese language to children of the Aborigine leaders (Thorne, 1997: 134). In the early 1920s, when Taiwan's first civilian Governor-general temporarily scaled back the role of the police force, there was a brief

spurt during which over thirty primary schools were established for the mountain aborigines, but by 1935 there were only five remaining (Chen, 1984: 217; Thorne, 1997: 134). In the 1930s, however, police run schools grew significantly in both size and number:

The number of children attending the police-administered and -taught schools increased from 6,887 in 1931 to 10,355 in 1942, and the percentage of school-age children registered in all schools, including about 50 regular primary schools which had slightly more than 7,000 aboriginal pupils, rose from 60.23 percent to 86.35 percent. (Chen, 1984: 230)

The curriculum at these schools continued to consist of little more than Japanese language classes, some arithmetic, “and perhaps music, manual training and agriculture” (Thorne, 1997: 134). Like the Dutch and the Qing before them, the Japanese believed that an lifestyle devoted to agriculture would result in less violence, and to that end they sought to encourage the Aborigines “to switch from firearms to peaceful agricultural implements.” The Japanese had a fair measure of success at promoting the shift to wet rice agriculture. “Under police direction, the aborigines tripled their rice yield and more than doubled their acreage in seven years, from 1924 to 1931” (1984: 229).

Japanese efforts at instilling Japanese cultural values through education were not limited to Aborigine children, a number of programs also targeted the adult population. Social groups and evening language classes were organized to reach adults, purportedly with some success (1984: 230). In many ways Aborigines, at least in official wartime discourse, were to become the ideal Japanese subjects and to serve as a model for Taiwan’s Chinese population. Some even claimed that the “aborigines were more Japanized than were the Chinese” (1984: 229)!

While mountain aborigines received only the most basic education from the police, some Amis were able to attend full fledged schools that had been set up in the valley. As it had been under the Qing, attendance was a problem, and by 1907 only around 100 students had managed to graduate from these schools. And like similar initiatives in the mountains, there was a burst of new schools built during the 1920s, when there were “as many as thirty Aborigine schools, with 46000 pupils.” Unfortunately, the similarities did not end there, “by 1935 only five of these were left” (Thorne, 1997: 134-135).

The massacre of 134 Japanese by Atyal Aborigines on October 27, 1930, in what is now referred to as the Wushe Incident 霧社事件 (*Wùshè shìjiàn*), deeply upset Japanese who were proud of their success in assimilating the Aborigines. The leader of the rebellion was Mona Rudao 莫那魯道 (*Mònà Lǔdào*), who was one of many Aborigine leaders who had been taken on tours of Japan in order to impress them with the power and superiority of the Japanese state (Stainton, 1995: 102-103).⁵ Equally shocking was the suicide of “two distinguished aborigine police, Dakkisnobin [拉奇斯·諾敏] and Dakkisnauai [拉奇斯·那威] ... who were lauded as symbols of Japanese colonial benevolence and tutelage” who took their lives rather than “forewarning the authorities or persuading the rebels to surrender” (Ching, 2000: 798). The practice of taking Aborigines on tours of Taiwan and Japan, a continuation of Qing era policies, was regularly done whenever Aborigine groups had been defeated in battle (Thorne, 1997: 138). But it was ended in 1930, soon after the Wushe incident (Stainton, 1995: 103).

The Wushe incident was the last major uprising against the state. For the most part, the Japanese could count on the cooperation of local leaders. Amongst the Amis they continued to count upon the role of the village headman (*tomok*, 頭目, *tóumù* in Chinese) that had been created under the Qing. “The job of tomok was made a lifetime one and he was given great authority within the village to carry out the will of the police” (Thorne, 1997: 132). The tomok were also picked to go on tours of Japan. In exchange, the tomok were responsible for the behavior of the people in their village, in a way that was similar to the Japanese re-implementation of the Qing era *baojia* system 保甲制度 (*bǎojiǎ zhìdù*, *hoko* in Japanese) in the Han areas. This included a form of *courvée* labor that was regularly expected of the Aborigines. But despite their power at the local level, the Aborigine elite were not able to get the same degree of education as Taiwanese did at the same time. By 1940, only eighteen Aborigines had graduated from secondary school in Taiwan (1997: 135). Although there were limitations on the ability of Han Chinese to attend post secondary school, there were still a large number that managed to become teachers, doctors, or to even attend university in Japan.

Christianity did not yet play an important role in the mountains or the east coast during the Japanese era. Even though missionaries were allowed to continue their activities after the Japanese gained control of the island in 1895 (at least up until the start of World War II), they were unable to make any headway into the Aborigine territories. Warfare, and probably a desire to keep outsiders from observing the treatment of Aborigines, led the Japanese to restrict missionary access “on the grounds that they did not want the missionaries to interfere with the aborigine ‘primitive beliefs’” (Richardson,

1972: 161). Even so, there were a few Aborigine converts from the cities on the west coast who were able to “spread the faith” on their own in areas unreachable by western missionaries (1972: 162). This limited exposure, together with the experiences of Aborigine prisoners of war who were exposed to Christianity, would make Aborigines even more receptive to foreign missionaries in the fifties and sixties.

Aborigines Love the Emperor Too! - The Kominka Era

The lack of a shared writing system and different naming practices presented obstacles for Japanese bureaucratic rule over the Aborigines. To deal with the problem, Japanese authorities assigned transliterated names using the *katakana* 片假名 (*piànjiǎmíng* in Chinese) script (Chou, 1991: 152-153). But during the early years, Aborigines were not encouraged to adopt Japanese names. This changed as the war approached and the Japanese sought to ensure the loyalty and cooperation of their Taiwanese subjects through the Kominka 皇民化 movement (literally to “transform into the Emperor’s subjects,” *huángmínhuà* in Chinese) (1991: 1). Unlike other state imposed name changing movements throughout history (Scott, 1998), which tend to more closely resembled the earlier assigning of transliterated names to the Aborigines, name changing under the Kominka was more of a privilege than a bureaucratic convenience (Chou, 1991: 152-153).

To be allowed to adopt a Japanese name (and thus assume certain privileges⁶ associated with it) Han Chinese had to apply as a family group, registered under the name of the family-head. Furthermore, the family had to be a “family in which the national

language was frequently used,” and they had to have demonstrated an enthusiastic commitment to becoming Japanese (1991: 115-117). For Aborigines however, name change was adopted on an individual, rather than family basis, making it much easier for educated Aborigines to meet the requirements (1991: 153-154). In some cases it seems that all that was required, was for the Aborigines to be able to read their Japanese names, as in the collective name-changing of 12,000 young Aborigine men in 1942 (1991: 154). There were, however, some restrictions placed on the Aborigines, at least at first, whose “Japanese Names” were only allowed to be quasi-Japanese as they were forbidden to use common Japanese surnames (Fong, 1993: 120). The Han Chinese, on the other hand, were allowed to take Japanese surnames as long as they were not the names of “emperors,” “famous personalities” (historical or contemporary), or “surnames indicating the geographical origins of former Chinese names” (which was feared to promote place-of-origin based ethnic rivalries like those in the nineteenth century) (Chou, 1991: 123-124).

As the war progressed, Taiwanese were mobilized to help fight. At first Taiwanese were not put directly into armed service, but starting in 1938 they were encouraged to volunteer to be porters, interpreters, and agricultural workers (1991: 171). Some enthusiastic volunteers signed declarations in blood declaring their desire to serve the Emperor, at least two of these Blood Pleas were written by Aborigines (1991: 168-170). Three years later, an island-wide Military Volunteers Program 陸軍特別志願兵 (*Lùjūn tèbié zhìyuàn bīn*) was established, and the response was so overwhelming that by 1942 425,921 Taiwanese had applied for only 1,000 available posts (1991: 178).

Those selected had to pass written tests in Japanese language, Japanese history, and even mathematics (1991: 177). It was believed by the Japanese that Aborigines were particularly well suited for jungle fighting, and special Aboriginal Volunteers Corps 高砂義勇隊 (*Gāoshā yìyǒng duì*) were organized for this reason. By 1943, six such groups had been organized and sent to fight in the jungles of Southeast Asia (1991: 195-196).

The sacrifices Aborigines were willing to make for the Japanese emperor were encapsulated in the tale of one young girl. In 1938, Sayon, a “seventeen year-old aboriginal woman” from eastern Taiwan, lost her life while carrying three large suitcases on her back as she helped an officer departing for the war to leave the mountains (Ching, 2000: 810).

In the spring of 1941, after learning of Sayon’s good deed (*zenko*), Governor- General Hasegawa Kiyoshi presented the Ryohen settlement with a bell inscribed with the following phrase: “The Bell of the Patriotic Maiden Sayon.” The commemoration reverberated throughout the island, especially among the aborigines, and generated a media sensation with a number of paintings of Sayon, a popular song, and eventually a film based on her story. (2000: 810)

Leo Ching argues that the power of Sayon’s story lies not in a Pocahontas-like narrative of assimilation, but in Sayon’s “extraordinary dedication to die performing her duty as an *ordinary* subject of the empire” (emphasis in original, 2000: 812). However, after finally gaining some limited recognition as Japanese subjects, the turning over of Taiwan to Chiang Kai-shek’s forces after the war was to set back any gains made by these sacrifices.

Hualian Under the KMT

At the end of the war, the impoverished east coast was still relatively sparsely populated. In 1950 the combined population of Hualian and Taitung counties was only 286,368, just slightly more than it had been ten years earlier. However, the construction of a cross-island highway, completed in 1959, and a new artificial harbor in Hualian in 1962, together with a government policy of encouraging demobilized mainlander soldiers to settle in the region, resulted in the doubling of the population to 454,249 by 1960 (Salter, 1970: 73; Stainton, 1995: 183; Thorne, 1997). Urban growth was even more stunning. Hualian went from 17,872 in 1940 to 80,533 in 1967, with similar growth in Taitung as well (Salter, 1970: 166). Because almost all of these new settlers were either Mainlander soldiers, or Hakka and Hoklo settlers from other parts of Taiwan, the end result was to dramatically reduce the percentage of Aborigines in these counties. Under KMT policy, ethnicity accrued to the father, resulting in an even more dramatic decrease in the official Aborigine population, since many Aborigine women married the retiring soldiers and other Han settlers (Stainton, 1995: 135). Suddenly the majority of Aborigines were minorities in their own counties.

Over two million mainlanders (both soldiers and civilians, although mostly soldiers) came to Taiwan in 1949. By the late fifties, early sixties, many of them were reaching the age when they should be decommissioned, posing a serious problem for the government which needed to find a way to integrate these former soldiers into civilian life (Chu and Lin, 2001: 118). One solution was to hire them for public works projects. The heavily US subsidized cross-island highway was one such project (Salter, 1970: 151).

The other solution was to give them land. Much of the land in the Rift Valley had belonged to the Japanese corporations that ran the sugar industry. The KMT assumed ownership of all land that had been owned by the state during the Japanese era, and failure to redistribute this land back to the Taiwanese was one of the sparks of the bloody uprising of February 28th, 1947. On the east coast much of this land was turned into farming cooperatives (Bain, 1993: 135). “In Hualien Hsien forty government-organized cooperatives distributed some 4,000 hectares of land. By 1950, however, these had been almost totally reconverted to private ownership, with only seven of the initial forty remaining intact” (Salter, 1970: 74).

In some cases the Aborigines were displaced to make room for the newly settled Mainlander communities (Stainton, 1995: 138-139). Much of this was done under the East Taiwan Land Development Bureau (ETLDB) which started a number of projects to create new arable land using mainlander labor (Salter, 1970: 105,115). The new owners ended up using less than one third of the land, favoring more lucrative opportunities in the urban areas or on the forested slope land (1970: 117). Rules restricting the farming of forested slope land were not strictly enforced at this time⁷ and many settlers moved into areas which had never been properly claimed by the Aborigines (1970: 76). Also, cash poor Aborigines lost a large portion of their land during this period through debt. “A 1978 study found that 34.4% of Plains Mountain farmers had no land of their own” (Stainton, 1995: 136). Most of the non-mainlander settlers to come over were farmers from the southwest where extensive property fragmentation made it unprofitable to stay on the land (Salter, 1970: 88).

Meanwhile, in the mountains, it was crucial for the KMT to quickly establish a policy towards the 65% of Taiwan which had been inside the Japanese-era guard line. The importance of this was driven home by the February 28th uprising and its aftermath. Some Aborigines had participated in the rebellion, and some Taiwanese leaders fled to the mountains after it was over - but were quickly caught thanks to the help of Aborigine leaders who had been paid off (Kerr, 1965: 344; Thorne, 1997: 155-156). The next year (1948) the KMT established their Mountain Reserve Policy 台灣省各縣山地保留地管理辦法 (*Táiwānshěng gèxiàn shāndì bǎoliúdì guǎnlǐbànfǎ*) which marked both a continuation and a transformation of Japanese era policy towards the mountains. On the one hand, the mountain territory continued to be property of the state, and movement continued to be restricted in these areas; however, whereas under the Japanese Aborigine movement had been restricted in order to allow free movement of Han laborers in the camphor plantations, now the Han were restricted from entering the mountains but the Aborigines who lived there were given freedom of movement. Missionaries were also allowed in, as I discuss below.

In the Mountain areas the duties of the Japanese era police force was replaced by the Peace Preservation Corps 保安隊 (*Bǎoānduì*):

a “specialized (police) force of semisecret elements” with “universal duties” to deal with “subversion” in Taiwan, was created; part of these duties consisted of guarding and controlling access to the mountain areas, which were not only ideal guerrilla territory but were also to contain secret KMT military installations over the course of the following decades. (Thorne, 1997: 158-159)

The Mountain Reserve Policy was more than just a security measure, it also entailed economic and social elements. Aborigines living in the mountains were not required to pay taxes and Aborigines were encouraged to engage in sedentary agricultural production (1997: 158-159). “This continued the Japanese programme of paddy rice promotion and movement of villages to more accessible areas” (Stainton, 1995: 109). Forced relocations to “lower” and “more accessible” regions of the mountain area also had a profound effect on the Aborigines who often ended up in segregated rural ghettos without any resources to speak of. 72 villages were thus relocated between 1945 and 1964 alone (Thorne, 1997: 159). Betelnut was one such village. The remains of the Japanese-era police-run school are still visible up the mountain from the current village, which, because of limited available land, is actually spread out over several kilometers along the valley at the foot of the mountain. The villagers still own property at the top of the mountain, but government policy severely restricts what kinds of crops they can grow on it, even as an illegal Betelnut plantation run by Han Chinese is allowed to function on the same mountain slope.

Aborigine Education Under the KMT

The banning of Japanese had serious consequences for Taiwan. In one stroke, the cultural and political capital of the island’s elite had been eliminated (Gates, 1981: 264). Japanese had provided a common language for all of Taiwan’s ethnic groups, and had been especially important for the previously isolated and illiterate Mountain Aborigine populations. They had gone from being the ideal Japanese subjects of the “Bell of Sayon”

to being merely unassimilated Chinese. As early as 1946, the government issued a plan to provide technical training for Aborigines, as well as to grant them equal opportunity to compete for universities and government posts (Thorne, 1997: 158-159). Needless to say, it would be some time before most Aborigines were ready to compete as equals.

The fifties saw the government adopt a series of policies aimed at the Sinification of the Aborigine population. In addition to changing their agricultural habits, and settling Mountain Aborigines into the lowlands, two other aspects of the “Mountain Reserve Policy” were aimed at Sinification: (1) *Political Education*, which included “anti-communist propaganda, wiping clean the remnant poison of Japanese thinking, forbidding the use of Japanese language, correcting mistaken ideas of freedom, teaching the concept of rule by law,” as well as (2) *Mandarin Language Education*, which was part of a larger campaign to teach Mandarin to all Taiwanese (Stainton, 1995: 110). As with all other local languages, Austronesian languages were banned as well.

The government considered Aborigine beliefs to be “superstition” that needed to be wiped out. Campaigns aimed at improving the economic conditions of Aborigines also sought to end such “superstitious” beliefs which were seen as holding Aborigines back. The three-stage Regulations Governing the Improvement of the Aborigines’ Living Conditions 台灣省山地人民生活改進運動辦法 (*Táiwān shāndì rénmin shēnghuó gǎijìn yùndòng bànfǎ*) introduced in 1951, explicitly named the ending of “superstition” as one of its goals (Thorne, 1997: 159-160). During this period, the government did significant damage to Aborigine culture in the name of stamping out such superstition, for instance by their policy banning and destroying Aborigine artwork (Chiu, 2000: 119).

Aborigines were also required adopt Chinese names. Many had previously adopted Japanese names, but “while the Han Taiwanese were asked to restore their original Chinese names, the aborigines were requested to adopt Chinese style names. No transliteration was allowed” (Chou, 1991: 157).

The damage to Aborigine culture was accelerated, if not completely compensated for, by an increase in access to basic education. By 1951 there “there were said to be 144 elementary schools for Aborigines with 17,734 children and 6,032 adults as students” (Thorne, 1997: 159-160). In many places it was the first time that Aborigines had access to the same national school system enjoyed by the rest of the population. However, in many cases these schools were staffed by retired Mainland soldiers who often had little or no training in education, a problem compounded by the fact that they often spoke Mandarin Chinese with strong regional accents that were hard for the students to understand⁸.

A third and profound change in the education of Aborigines was the lifting of the Japanese-era ban on missionaries in the mountain regions. The Chiang family had secured support in the US for their leadership of so-called “free China” with the help of Christian organizations who had long been frustrated in their dream of converting the Chinese (Kerr, 1965: 24,357). In less than ten years after the KMT arrived in Taiwan, there was a meteoric rise in the number of missionaries, from 30 in 1950 to “seven hundred in 1957” (Kerr, 1965: 413)! As with earlier efforts missionary activity in Taiwan, the missionaries found the Aborigine population much more receptive to their message than the Han Chinese population. Most likely, the Aborigines looked to an outside power

to protect them against the questionable motives of their new rulers (Thorne, 1997: 167-68, n. 41). Christianity also provided Aborigines with an alternative path to modernity, one which allowed them to claim both equality and difference simultaneously (Stainton, 1995: 210-211). But there was a more immediate incentive as well, which was the provision of food and medical supplies by the missionaries to regions that had been hard hit by the war. Many Aborigine families would send one child to the Protestants and one to the Catholics in order to maximize their returns (Thorne, 1997: 171-172).

Whatever the reasons, the results were quite remarkable. “The number of Protestant Aborigine Christians grew steadily to 26,597 in 177 churches in 1954, then jumped to 59,239 in 366 churches by 1959” (Thorne, 1997: 166, n. 40). And that is not counting the sizable number of Catholics, who accounted for thirty-four percent of the Aborigine population in 1977, by which time it was estimated that about seventy percent of the Aborigine population was Christian (Stainton, 1995: 170-171). When compared to the fact that only about seven percent of the entire population of Taiwan is Christian (in 1992), it becomes clear the extent to which Christianity has come to be associated with Aborigine identity (1995: 169).

The presence of the church has had a profound impact on Aborigine cultural and political life. As had been the case during the Dutch and Japanese eras, the missionaries continued to emphasize reading the bible in the local languages. Even the Catholic church, after the Second Vatican Council in 1962, embraced the use of local languages (Wang, 1995: 7). This policy had two important effects: First, it raised the first generation of Aborigine leaders to be literate in their own languages. Secondly, it brought the church

into direct conflict with the government's Mandarinization Campaign 國語運動 (*guóyǔ yùndòng*), which had banned the use of local languages throughout Taiwan. In 1975 an international incident was sparked when Romanized bibles and prayer books were confiscated by the government (Stainton, 1995: 156-157). The Presbyterian Church played an especially important role in raising a generation of Aborigine political leaders. Most Aborigine office holders in Taiwan are associated with the Presbyterians, and are graduates of the church's Yushan Theological Seminary, which was established outside of Hualian in 1959 (1995: 151-152). Graduates of the seminary have also become many of Taiwan's leading Aborigine activists in the eighties and nineties (1995: 170, n. 19).

Conclusion

The history of Taiwan's Aborigines is one of military conquest, and state sponsored colonization of their land by Chinese and Japanese settlers. But that history was not a uniform one. As we have seen, there are important differences between the policies that were conducted in the mountains and those in the plains of the east coast. In the next chapter I discuss my experiences in a small village on the eastern plains. There, I discovered a huge gulf between the plains Aborigines in the village where I did my fieldwork and mountain aborigine village just fifteen minutes away. I also observed how patterns of state patronage affected the production of Aborigine culture within the village, and the importance of the church as an alternative source of institutional power.

Notes

¹ This term, which encompasses all of the assimilated Aborigine ethnic groups on the West Coast is not to be confused with the contemporary distinction between “Mountain” and “Plains” Aborigines.

² See Chapter 3 for discussion of alternative degrees used to reward the loyalty of both Aborigines and Han Chinese who were unable to pass the difficult examinations.

³ “Pangcah” is another term for Amis. In the early eighteenth century the powerful Pyuma chieftain at Taitung declared his loyalty to the Dutch. This furthered the division between the Amis in the south of the Rift Valley, who were under Pyuma rule, and the Amis in the north of the valley who were not. The term “Amis” itself seems to be of Pyuma derivation, meaning “North” and refers to those *southern* Amis who were just North of the Pyuma, while the *northern* Amis are often referred to instead as “Pangcah” (Thorne, 1997: 25-26, n. 22). See introduction for an account of my choice of terms.

⁴ Beginning soon after 1895, ... the Japanese rulers progressively built an armed ‘guard line’ around most of the central mountain core of the island and then, over a period of 20 years, moved the guard line inwards against the continual armed resistance of high-mountain Aborigine groups (Thorne, 1997: 123).

⁵ From “1898 to 1929 there were 9 tours involving 337 people” (Stainton, 1995: 103).

⁶ In general, they were to be treated by policemen as the equals of ethnic Japanese. Educationally, their children were allowed to take the entrance examinations for high schools which formerly admitted only Japanese students. Economically, during times of rationing they were granted more food than their fellow countrymen who stuck to Chinese names (Chou, 1991: 157).

⁷ Little has changed. The mountains are still covered with illegal betelnut plantations owned by Han Chinese.

⁸ During my fieldwork I was told many stories about the incompetence of such teachers, but I have not found any record of the actual percentage of retired soldiers who worked as teachers in Aborigine areas. The one retired mainlander primary school teacher I met was an energetic and talented teacher.

CHAPTER 7
LEARNING TO BE “LOCAL”: CULTURE, LANGUAGE AND IDENTITY IN
RURAL TAIWAN

Choosing a Field Site

I first came to Fountainhead Primary School in the Spring of 2000. I met the Principal, Chen, through a friend at the Ministry of Education (MOE). Principal Chen met us at the airport and drove us out to Fountainhead, forty five minute drive south of Hualian, in the narrow Rift Valley between the high Central Mountain Range 中央山脈 (*Zhōngyāng shānmài*) and the smaller Coastal Mountain Range 海岸山脈 (*Hǎiàn shānmài*) which cut the valley off from the Pacific Ocean. It was a clear day when I visited the school, and the bucolic view was refreshingly different from the overcrowded, polluted cities on Taiwan’s West coast. The slightly bitter wild vegetables we ate at an Amis 阿美族 (*Āměizú*) restaurant that evening were also quite different from anything I had experienced before in Taiwan. It seemed to be everything I had been looking for in a field site: There was as strong Aborigine identity, with Amis accounting for nearly sixty percent of the school’s student body, but it was ethnically diverse with many Hoklo, Hakka, and Mainlander students as well. Principal Chen was Amis herself, and was committed to implementing reforms to teach Aborigine language and culture to the students. Or so I thought. I would learn later on that her motivations were quite different,

and that she was a sophisticated politician who was able to use interest in Aborigine culture to appropriate resources that would help her students succeed in the Taiwanese educational system. That is, she was more interested in what culture could do for her students than in the cultural policies in and of themselves. In the end this turned out to be even more interesting for me than the language and cultural policies I had come to study, but it did make it difficult for me during the first months of my fieldwork as I struggled to understand why the curriculum lacked the Aborigine language classes I had come to study. I knew that these would not be required by the new 9-year Curriculum until they were officially implemented in the 2001-2002 school year, but I did feel that I had been misled when I discovered that the limit of Aborigine language learning consisted of a few songs used during dances or in school cheers. Still, I chose to stay at my field site rather than move elsewhere because of the dedication of Principal Chen to helping Aborigine students and the unique access she provided me to a part of Taiwan even many of my Taiwanese friends in Taipei have never seen. Moreover, as I began exploring the valley I discovered two additional communities nearby, the primarily Bunun 布農族 (*Bùnóngzú*) Betelenut village, and the primarily Hakka Lucky Village. Visiting the primary schools in those villages gave me a broader perspective on the history of the valley, and the issues facing the region, but it was especially the differences between Betelenut and Fountainhead which interested me.

Three Primary Schools

Although Betelnut Primary School is only a few kilometers away from Fountainhead Primary School, they are seemingly worlds apart. Betelnut Primary school is slightly above the valley floor on the side of a mountain whose slope (like most of those in the valley) is devoted entirely to the cultivation of betelnut, while Fountainhead Primary School is squarely in the middle of the paddy land that covers most of the valley floor. The differences do not end there. While the students at Betelnut Primary are almost exclusively Bunun Aborigines, many of whom must commute from scattered villages all along the lower perimeter of the same mountain, Fountainhead students are a mix of Hoklo, Hakka, Mainlanders, and Amis from both sides of the valley floor. But what is most striking is the vibrancy and wealth of Fountainhead village, where all the betelnuts are processed by Han (mostly Hoklo) businessmen, opposed to the desperate poverty of Betelnut village where nobody owns any of the natural wealth that surrounds the village.

In order to understand the differences between these two communities, I began to look at the history of Aborigine integration into each of the succession of states that ruled over Taiwan (see Chapter 6). Betelnut Village, it turns out, is on the other side of an invisible line that demarcates not only one district from the next, but also the categories of “Plains” and “Mountain Aborigines.” Although both districts are within the larger entity of Hualian County, the district that contains Betelnut Village belongs also includes the huge mountains looming over the narrow valley. Fountainhead Village, on the other hand, is in a district that extends across to the foot of the coastal mountain range on the opposite side of the valley floor. This is important because the Amis Aborigines who

make up fifty-eight percent of the students at Fountainhead Primary, are Plains Aborigines, while the Bunun students who make up almost the entire student population at Betelnut Primary are “Mountain Aborigines.” Although there are important cultural differences between Amis and other Aborigine groups who traditionally lived in the plains of the east coast, and between the Bunun and other Mountain Aborigines, the historical process of incorporation into the state has followed strikingly different patterns in these two regions.

The region immediately around Fountainhead Primary school, including the school’s catchment area with Fountainhead and three Amis villages, as well as two neighboring villages with their own schools was collectively known as Bell Valley, a name supposedly derived from the bell shaped mountain dominating the region, but which may have simply been a loanword from the original Amis name for the valley. Amis were the majority of the Bell Valley’s population, but the commercial hub was Fountainhead whose population was largely Hoklo, although there were some Hakka as well – including the mayor. The older generation were perhaps the most divided along ethnic lines. It was amongst the older generation that language issues continued to present the greatest barrier. I found that those over the age of sixty were the most likely to remain largely monolingual in their mother tongue, whether Amis, Hoklo, or Hakka. Especially amongst the farming families and Aborigines, where the grandparents were unlikely to have received much formal education. If they had received any it was from the Japanese, and some could still speak Japanese. Most could understand Mandarin, but only speak it with some effort. This, together with the tendency to live in ethnically segregated

communities, meant that there was a tremendous divide between communities that were separated by only a few minutes walk.

The schools were the greatest unifying force in the valley. Except for Lucky and Betelnut villages, everyone attended the same primary school in Fountainhead, although a small number of families arranged for their children to attend schools in Hualian, or one of the larger nearby towns. Lucky's primary school was a giant new building, and it was largely empty. Like many rural schools its population had been declining steadily, and it was likely that in the near future the school would be closed and the students would have to go to Fountainhead as well. Betelnut village did not have this problem, due to the high birthrate in the village. Ethnic divisions seemed less important to the children than those of wealth. The children who owned fancy bicycles and listened to the same pop-stars would play together no matter which of the local communities they were from. Apart from the Church, which has always been active in Aborigine communities (see Chapter 6), the only other local organization which played a significant role in the lives of these children was the school. There was also a middle school in Bell Valley, and it was here that all six villages came together, except for those students who tested well enough to go to a better middle school. Mark, a Bunun teacher who had grown up in Betelnut village told me that the first time he encountered racism was when he started attending middle school in Fountainhead, where he was teased for the darker color of his skin (field notes, March, 2001). (The Bunun tend to be slightly darker than other Taiwanese.)

Local Divisions

On Christmas of 2002 I returned to Fountainhead Primary school for a follow-up visit. It had been nearly a year and a half since I had left this village, but little seemed to have changed. Principal Chen, had arranged a Christmas celebration for the grandmothers of the neighboring Amis village. These women had formed an Amis dance troupe and together with the principal and some students from the school, I had traveled with them to several dance contests and performances around the Island. I knew every single one of these grandmothers could sing, dance, and drink me under the table, so once the liquor started to flow I took my leave. Besides, they would be dancing and singing long into the night, and so it gave me time to visit some of my acquaintances in the village. I went to see Mr. Yang in his palatial home amidst the rice fields. While we were having tea, he showed me his latest project which was a handsomely published book of paintings by the women of Fountainhead. These Han Chinese (both Hakka and Hoklo) grandmothers had mostly been farmers in their youth and had only learned to paint under the tutelage of Mr. Yang, himself an accomplished painter (he had attended Taiwan's premier art school). He gave me a copy of the book, and it was under my arm when I returned to the school where the drinking, singing, and dancing was still continuing as I had expected. Principal asked me about the book and I showed it to her. She made a face and looked at me and said: "Mr. Yang doesn't like poor people."

Not all the Amis were poor, nor were all the Han Chinese well off: some of the most dire poverty existed amongst the Han Chinese itinerant workers in Fountainhead, and some of the nicest homes were in the Amis villages; however, there can be no doubt

that the Amis were disproportionately afflicted by those troubles so commonly associated with poverty: broken homes, alcoholism, failure at school, domestic abuse, etc.

Table 2: Life expectancy of Aborigines, compared with the rest of Taiwan

	Aborigine Men	Aborigine Women	Other Taiwanese Men.	Other Taiwanese Women.	All Taiwanese¹ Men	All Taiwanese Women
1999²	62	72	72	78	72.5	75
2000³	62.7	73	(no data)	(no data)	72.7	75.3

Table 3: Educational attainment of Aborigines, compared with all Taiwanese

	2001 Aborigines⁴		All Taiwanese	1999 Aborigines⁵	All Taiwanese
	Female	Male			
Primary school included and under (under 6 years)	40.5 (%)	28.4	25.5	(no data)	27.0
Junior high (equals to 9 years)	18.6	23.2	16.3	61	17.2
Senior high (equals to 12 years)	28.7	37.6	33.7	(no data)	33.5
Junior college (equals to 14 years)	8.2	6.8	24.5 ⁶	9	22.3
University included and above (more than 18 years)	4.1	4.0	(no data)	(no data)	(no data)

The newly built homes in the Amis villages were largely empty, having been built on money sent home by family working in the large industrial towns on the West Coast. Few

Amis could find work near home, and as a result there were almost no young adults in the area. Children were raised by their grandparents, or just as often, the children themselves had to take care of both their grandparents and their younger siblings. The Han Chinese were more likely to own land in the valley, or at least some betelnut plantations along the lower edges of the mountains. As a result, they were more likely to remain together as a family. Although few among the younger generation worked in the vicinity of the village, the Han Chinese were more likely to be able to find work in the larger cities on the East coast, such as Hualian, allowing them to maintain a home in the village. The jobs on the East coast were more likely to be with the government, small businesses or in the service industry; jobs requiring credentials and perhaps some higher education. With lower rates of school completion, the Amis were more likely to end up working in low-end construction jobs, factory jobs, or perhaps in the Army or merchant marines – all jobs which would take them far away from their families. Some of the Han Chinese in the village were recent migrants from Taipei, attracted by the lure of a rural lifestyle supplemented by Taiwan's thriving betelnut industry (Wu, 1997).

The very real ethnic segregation in the valley was rarely talked about, and yet shaped the ways in which “local” culture was constructed in each community. What struck me was how unconcerned most people were with local culture. Most people seemed to feel that culture was a divisive issue and were more concerned about practical matters such as the economy. However, this does not mean that culture did not play an important role in the community. In order to understand how culture came to be mobilized within the community I draw on Gramsci's concept of “intellectuals” to

explore the ways in which two local figures implemented cultural policies: Mr. Yang and Principal Chen. Mr. Yang's cultural production is focused on improving the image and economy of the region, as well as servicing the Hoklo and Hakka communities, while Principal Chen is primarily concerned with bringing economic resources to the local Amis population. For contrast, I then look at Mark, the Bunun teacher who eventually gave up teaching in order to serve the Bunun community through the Presbyterian church. His rejection of the cultural model for local intervention in favor of a religious one highlights the limits of cultural discourse.

Global Culture and Organic Intellectuals

Hualian county was one of the last regions of Taiwan to embrace the concept of "local" culture. The region's Hakka, Aborigines, and retired Mainlander soldiers are considered reliable members of the KMT's Iron Ballot constituency. Even the presence of the Presbyterian YuShan Theological College and Seminary 玉山神學院 (*Yùshān shénxuéyuàn*), home to many of the leaders of the 1990's Aborigine rights movement, has not had a significant impact on how most Aborigines vote. As a result, the region did little to implement local culture initiatives begun elsewhere in the 1990s, until it became national policy. Lacking a large concentration of any single ethnic group, there was also little desire to politicize ethnic identities in the region. However, once national identity was defined, from above, as grounded in the local, the region was more than happy to jump at the new opportunities to develop "local" culture. Isolated and relatively pristine, domestic tourism is one of the few growth industries in Hualian. Indeed, the version of

the local cultural curriculum textbook which the government had prepared, and which was in use when I arrived in the field, read more like a tourist guide than a primary school textbook. In addition to detailed and flowery descriptions of the regions scenery and ethnic diversity, it provided nostalgic descriptions of how Hualian city's commercial quarter had once been the red-light district that entertained American soldiers during the Korean War! It was also no surprise that the academic department most responsible for the study of local culture at the region's largest and most prestigious university, Tung Hwa University 東華大學 (*Dōnghuá dàxué*), was its Department of Tourism 觀光暨遊憩管理研究所 (*guānguāng jì yóuqì guǎnlǐ yánjiùsuǒ*)! Since I left the field in 2001, however, the university has opened a College of Indigenous Studies 族群關係與文化研究所 (*zúqún guānxi yǔ wénhuà yánjiùsuǒ*), headed by the former dean of YuShan Theological Seminary.

Thus, for most people in Hualian, the promotion of local culture was not about ethnic nationalism, but about promoting self-confidence and pride in one's culture and community. One might argue that there is very little difference between the two, but for the people I met and spoke with during my time in the region, commercializing identity was fine, but politicizing it was not. Most of the teachers and educators I met felt that these were issues best left to the communities. There was very little of the anger at government suppression of local identities that I encountered in Taipei or cities along the West Coast.

This is partly due to the politics of patronage. Hualian remains a heavily agricultural region, and the Farmer's Associations still control much of daily life. As

discussed in Chapter 4, these organizations have a long history of KMT (and Japanese) patronage. (Similarly for the Aborigine population.) James Soong, who had been provincial governor under the KMT (before that position was dissolved, along with the entire “provincial government”) claimed to have visited every Aborigine village in the country. It was joked that he left a school, community center, or firehouse behind in every one of them! And part of it has to do with the inability of the DPP to convince the Hakkas and Aborigines that they really had their interests at heart. When politicians speak in Hoklo it sounds like Hoklo nationalism, not like multiculturalism, no matter what the DPP might say. The politics of locality, on the other hand, fit easily into the patronage-politics that have dominated the region for so long, providing yet another avenue for the distribution of federal and state funds to local communities (see Chapter 6).

Despite the regions reticence to embrace identity politics, there was no doubt that this is exactly what was resulting from programs aimed at developing local culture. One of the reasons that “local culture” works as a euphemism for Taiwanese identity politics is because the rural landscape is so ethnically segregated. What is special about a local community is precisely its ethnic and linguistic traditions. At the same time, the model effectively subordinates heterogeneous local culture to the larger “imagined community” of the Taiwanese nation (Anderson, 1991), a concept which is conveniently left undefined. On the one hand, if Taiwan is the sum of its parts, then it localism presents a multicultural patchwork in which no one language or culture can be dominant; however, some languages and cultures exist in many more localities than others! Moreover, the

concentric circles radiating outward from the local level embed Taiwan within the greater Chinese cultural sphere, whether or not this is openly admitted. And beyond the sphere of Chinese language and culture exists that of global culture, which is a euphemism for American cultural hegemony.

The end result of these concentric circles in the creation of a cultural hierarchy in which, despite all the rhetoric praising the local, the local is effectively subordinated to national and global cultural markets.

..the ‘real’ universality of today’s globalization through the global market involves its own hegemonic fiction (or even ideal) of multiculturalist tolerance, respect and protection of human rights, democracy, and so forth; it involves its own pseudo-Hegelian ‘concrete universality’ of a world order whose universal features of the world market, human rights and democracy, allow each specific ‘life-style’ to flourish in its particularity. So a tension inevitably emerges between this postmodern, post-nationstate, ‘concrete universality’, and the earlier ‘concrete universality’ of the Nation-State (Žižek, 1997: 40-41)

The new “concrete universality” of the global market allows for multicultural tolerance precisely because the threat of cultural universality is subsumed by its being forced to play by the rules of the market. Nonetheless, it would be a mistake to underestimate, as Žižek does, the continued importance of the state in shaping national markets (Weiss, 1997). The Nation-State is not some holdover from the modernist age which survives only as an anachronism in this “postmodern” era. The extent to which global cultural forces are allowed to compete with local ones (and local cultures with one another) is negotiated at the level of the state, and the state also plays a significant role in the production of local and global cultures as commodities.

In Gramsci's framework, the nexus between state and local culture takes the form of "intellectuals," a category which included everyone from school teachers to priests to politicians. In fact, for Gramsci, "all men are intellectuals," but he is careful to add that "not all men have in society the function of intellectuals" (Gramsci et al., 1972: 9). What exactly the function of intellectuals is remains rather vague. This is because Gramsci further distinguishes between different kinds of intellectuals on the basis of their function. "Organic" intellectuals articulate the interests of their own group (Salamini, 2002: 70). "Traditional" intellectuals, on the other hand, are groups who had, at one time, been organically linked to a particular social group, but through a process of rationalization and differentiation now "present themselves as independent and autonomous" (Salamini, 2002: 77). The assimilation of such traditional intellectuals is a major struggle in the battle for hegemony (Greenberg, 2004: 152). It is in discussing traditional intellectuals that Gramsci uses the term "cosmopolitan," for he felt that Italy's traditional intellectuals saw themselves as part of a cosmopolitan class of European intellectuals, rather than "Italian" (Salamini, 1981: 75).

In Taiwanese terms, the politics of locality effectively created a new category of organic intellectuals who were indebted to the state, thus bypassing the growing class of cosmopolitan traditional intellectuals fostered by Chiang Ching-kuo's KMT in the 1970s and 80s. This was the true secret to the success of Taiwan's "passive revolution." In Gramsci's terms, people like Mr. Yang and Principal Chen are "intellectuals." And, indeed, the new 9-year Curriculum, as well as national policies promoting local culture, treat school teachers and local cultural workers as intellectuals (Ministry of Education,

2004), and seek to empower them to play a greater role in shaping local identities. In Chapter 6, I discussed how teachers were resentful of being treated as intellectuals because of the extra work involved in having to research their own curriculum. Teachers complained that they were ill trained to take on such tasks, and that they still had to work hard to ensure that students learned the basic skills necessary to perform well on examinations. I suspect that teachers also resented having to sort out the politics of locality. Over and over again, whenever I asked teachers about teaching local languages and culture, I was told that it should not be the responsibility of the school, that such learning should come from the home and the community. Assuredly, when there was little support for such learning at home, the limited efforts of the school were likely to be wasted.

My research both confirmed and contradicted this assertion. It was true, as I saw, that students who failed to receive training in their local language at home were unable to get much out of the limited amount of time devoted to teaching these languages in the school. On the other hand, the very concept of community and culture was largely defined by intellectuals who were able to direct state funds towards local cultural programs.

Mr. Yang and His Map

The Cultural Worker

Mr. Yang and his brother were born in Fountainhead, the children of a mainlander school teacher from Fujian province. He father was fortunate in that, unlike some other

mainlanders who were permanently separated from their families, his wife joined him in 1948, before the border was closed. At the time his father had come the homes were still mostly made of traditional thatch, the roads were closed regularly due to flooding, and malnourishment was rampant due to the impossibility of farming during the war. His father had taught at the primary schools in both Fountainhead and Betelnut villages. Mr. Yang was well educated, having attended Taiwan's top art school, the same one that the filmmaker Ang Lee 李安 (*Lǐ Ān*) (director of "Crouching Tiger, Hidden Dragon," who was also originally from Hualian) attended. His children were now in their teens, but they too had attended Fountainhead primary, and his nephew was a student while I was there. Mr. Yang made a living as a traveling salesman, selling items to small shops up and down the coast out of his small truck. I was told that he and his brother had inherited a significant amount of land from their father.

I had first met Mr. Yang at a conference on local history held at Tung Hwa University, where he had presented a paper on collecting local oral histories. He had done this as part of a national government project to collect oral histories and store them in regional archives. Since 1995 he had also been involved in working with the community center in Fountainhead. My first encounter with the community center was when they brought in a Chinese doctor to talk about bone scraping 刮痧 (*guāshā*). They drafted me to be a test candidate, and the doctor demonstrated on me. The next day the local papers ran the stories together with pictures. This event, like many other at the community center, was primarily targeted at the aging Han Chinese population in Fountainhead. At the age of 49 (in 2000), Mr. Yang was significantly younger than most of the village's adult

inhabitants. Mr. Yang was also the editor of a monthly newsletter for Bell Valley, something he worked closely on with his friend Mr. Ho, a poet and filmmaker from Taipei who moved to Lucky Village where he lived in a large shed filled with books. Mr. Ho was also devoted to documenting local history and culture, although his own activities were more regional, involving putting on theater productions with the Bunun in Taitung, as well as making films about artists in Hualian.

The Map

As discussed in Chapter 6, the development of local history and culture in Taiwan is connected with the development of local tourism. Mr. Yang, together with other community members, put together a glossy brochure on the history of the village, identifying local landmarks and cultural sites, complete with a large tourist map, and color photographs. There is a state park in the valley, one of the few items of attraction that might actually draw tourists. While the whole valley is quite beautiful, there park itself does not offer much that is unique, and the park did not seem to be doing well. It had suffered damages from the last typhoon, and these had still not been repaired. Still, the map itself is a fascinating cultural document, and it is worth exploring in some depth.

It is perhaps unfair to make too much of the map's iconography, since it seems to have been taken from a standard clip-art collection; but it is strange that the map is populated with what appear to be European tourists, marching around with backpacks and blond hair. Fountainhead Primary school is depicted with baseball players,⁷ while the middle school shows what appears to be a black basketball player. Two of the three

aborigine villages are marked with pictures of dancing indigenous peoples in traditional dress, but they do not seem to be Taiwanese Aborigines, rather they look Polynesian. The overall effect of these cartoon figures wandering around the map in cars, on bicycles and on foot is to convey an image of a tourist friendly region. The fact that the map is only in Mandarin Chinese makes it clear that it is intended only for domestic tourism, but I suspect that the map's main purpose is defining the community and promoting civic pride. Fountainhead was not a major tourist destination, and was not set up to receive tourists, except for the dilapidated state park.

Each of the ethnic groups in the village is listed as a local attraction. The Amis and the Bunun are shown in their traditional dress. The Bunun are singing, and the Amis are dancing. The description of the Bunun, under the title "The Harmonic Singing of the Bunun: The sound of their society and their natural world" gives a general feeling of the style and manner of description:

The Bunun live in Betelnut Village, on the north side of the river, at the base of the mountain. In 1939 they were forced to migrate over the mountains to this location. Their life is brimming with the wisdom of the jungle and the culture of mountain forests. Their eight-part harmonious singing is famous throughout the world, and is regarded as the sound of nature. Because our villages are closely linked together, the Bunun easily became a part of Bell Valley's social circles. (Mr. Yang, 2001)

Song *was* the local specialty of the Bunun, and I even have a CD of songs from the village presented to me by the Betelnut Primary school principal. It is also true (as discussed in Chapter 5) that the village was forcibly relocated to the valley in 1939. But the sad fact is that Betelnut village was an impoverished community and was largely segregated from Fountainhead. The principal of Betelnut Primary had, like Principal

Chen, complained to me that Mr. Yang never visited Betelnut when he was preparing his monthly newsletter, and did not organize any activities that included their village.

The description of the Amis was not much different. It tells us that they are likely to be Amis who migrated from the region bearing the same name as the largest village, and that one of the other villages is named after a plant commonly eaten together with betelnut by the Amis. Then it concludes with a discussion of the dancing during the harvest festival. The entire section is titled “The singing and dancing Amis”! and the accompanying pictures show them doing just that.

The Hoklo are not depicted as singing and dancing, but as hard working. The section on the Hoklo is titled “The callused hands and feet of the Hoklo.” It describes how when the Hoklo came to the region most of the land was already owned by the Amis and the Hakka, so they either had to work in the sugar factory (see Chapter 5), open up new land for development, or work as tenant farmers for others: “life was hard, most lived hand-to-mouth.” It then describes in moving terms a stone tablet that was discovered with inscriptions describing the incredible hardships of those early years, “a grain of sand, a stone, share equally the tears of blood.”

The section on the Hakka community also starts with a description of how they originally came to the valley, starting with those Hakka who were recruited by the Qing to help suppress Aborigine rebellions in Hualian at the end of the nineteenth century (although the description does not refer to the Aborigine rebellions directly as such). It mentions that some intermarried with the Amis population, and that more came over during the Japanese era because government policies encouraged people to settle the

large tracts of “unmanned” fertile land. It then mentions by name the leader of one Hakka clan who came to the region as a group, and who built the oldest “earth god” 土地公 (*Tǔdìgōng*) temple in the valley. Finally, the section describes how fertile the region is and how efficiently the “diligent and thrifty” Hakka were able to cultivate it.

Interestingly, there is no section on the Mainlander population of the valley. The only mention of the village where most of the Mainlanders live is in reference to the Amis folk etymology of the village’s name. Historic buildings and temples⁸ are mentioned: The train station, the medical clinic established by the Japanese (and still inhabited by the Japanese educated doctor), the valley’s irrigation system (first built during the Qing era, but greatly expanded during the Japanese period), the ruins of a Shinto Temple build during Japanese rule, the martyr’s shrine dating from the Qing era, and the local Taoist temple (rebuilt after World War II), are all given brief histories. Particular attention is paid to the heroic efforts to preserve local gods when they were banned as part of the Komika movement (see Chapter 5). There is also a description of an abandoned dormitory for tenant farmers, many of whom were Plains Aborigines from the East Coast. The building was abandoned when most of them moved back West during the difficult war years, but some of the small shrines they built still remain.

The remaining entries mostly deal with local natural scenery and wildlife, billing the valley as Taiwan’s “largest natural classroom.” The flip side of the map discusses the park and the natural scenery at length, clearly the valley’s biggest selling point. But there are also two large panels on local culture. The first one is devoted to the “unschooled painters” of Fountainhead – the same ones whose work is featured in the book *Mr. Yang*

presented me with. Not surprisingly, considering Mr. Yang's role in developing the map, these painters are described in glowing terms. It even provides quotes from some of Taiwan's foremost painters praising their work. The second panel describes a tradition of playing drums to commemorate the birthday of the village deity. It traces this tradition back to 1889 when Qing soldiers built a fort at the site of Fountainhead primary school and consecrated a temple to the deity. However, it also makes it clear that the local tradition of having annual drum contests was started in 1998 as a way of commemorating the old traditions.

The Americans Visit

In January of 2001 a group of high school students from South Dakota arrived in Fountainhead. They called themselves the "Ambassadors of Excellence," so named because they were all students who had demonstrated some academic or artistic talent. There was a whole day of events planned at Fountainhead middle school. The teachers taught the visitors how to make grasshoppers by folding blades of grass, and the kids all seemed to enjoy playing basketball together in the afternoon. Then came the cultural events. The students from South Dakota performed a mixture of Broadway show tunes, Brazilian salsa, and Lakota Indian dances (although I do not believe any of them were actually Lakota or Brazilian). The village performances seemed to come straight out of the map. The Bunun sang, the Amis danced (all in traditional dress), and the Han Chinese students performed on the drums.

Dancing for Opportunity

The School Principal

As a bureaucrat in the state educational system, Principal Chen had to function within a very different set of constraints than did a freelance cultural worker like Mr. Yang. Principal Chen is an excellent administrator, who understood the political and bureaucratic skills necessary to operate within the system, and this is what endeared her to the local community. As an Amis woman, and a vocal advocate of promoting the culture and well being of “her people,” she was still popular among the Han Chinese parents in the village because of her ability to attract state funds to improve the school both physically and academically.

I lived together with the principal, the school director (also Amis) and a Truku 3rd Grade teacher in the school’s small faculty dormitory for an entire school year. She is one of the most driven and hard working people I have ever met. She never sleeps more than five hours a night. If she is not attending a meeting somewhere, she is on the phone, or else at her desk going over the school’s paperwork. If she has some free time, she uses it to inspect ongoing construction project on the school grounds - and there are many of those as she is always finding new money to improve the school’s facilities. She is not someone with tremendous ‘book learning’ but she is very intelligent, and she understands how to “get things done” (做事, *zuòshì*). It is knowledge she is proud of and she tries hard to share it with those who work under her. She actively cultivates the talents of all the teachers at the school, but she seems to particularly take Aborigine women faculty under her wing. While teachers appreciate her guidance and her attention to detail, these

qualities also make her a very demanding boss. She does not run the school as a democracy, and there was a certain degree of frustration amongst some of the faculty at her authoritarian leadership style.

Principal Chen is Amis, but she grew up in a Atyal village, and spoke Atyal as a child. She remembers her parents speaking Japanese to each other when they did not want the children to understand what they were saying, but she herself does not speak any Japanese. Later in life, as a teacher in the 1980s when everyone in Taiwan began rediscovering their own language and culture, she taught herself to speak her mother tongue by speaking to members of the older generation. She also can speak some Hoklo. While she is far from fluent, she has a great ability to use language for dramatic and humorous effect, and is able to use Hoklo well enough to charm Hoklo speakers. She quite often plays on the different meanings that the same sound has in the various languages she is surrounded with: Mandarin, Hoklo, Atyal, Amis, and even Hakka and English.

Principal Chen never married, or if she did marry at some time in the past she does not talk about it. It seems hard to imagine her having much time for anything other than her work. While women wield a fair amount of power in Taiwanese society, they usually do so in the background, leaving public life to the men (Simon, 2003). Although some women manage to function in the public world in a more feminine fashion, there is no doubt that Principal Chen has a distinctly masculine approach to her public behavior: she often uses sexual humor, she can drink heavily if she needs to, often encouraging her staff to drink excessively at special occasions, she can also be aggressive and

authoritative on occasion. How is it that such behavior is accepted in a society where women are usually expected to be demure? I think part of it is that she is an older, unmarried woman but certainly an important part is that she is not Han Chinese. As an Aborigine woman, there are different expectations for what is appropriate or expected. For instance, Aborigines are considered to be more open about their sexuality, something that is often discussed in the myths and stories of the Amis. Her behavior certainly does not go without criticism. She has a “reputation” for being a strict and “severe” (厲害, *lihài*) boss, that I doubt would be as negative if she were a man.

In some ways the school is run like a military academy, which was in the model that Taiwan’s schools had been run on for many years, although things were beginning to change, especially among the younger generation of teachers who have been influenced by contemporary Western educational theory. Many behaviors were fairly standard for Taiwanese schools, but were strictly enforced: students should salute and greet teachers by title when passing them, students should salute and shout “Reporting!” (報導, *bàodǎo*) before entering the teacher’s office (as in the military), when the entire school was assembled, such as at the biweekly flag raising ceremony, the principal would drill students in kneeling and standing to attention. If the students did not immediately snap to attention then they would have to do it several more times until they were all in unison. Similarly, the students were taught to cheer in unison using an Amis language cheer. The recasting of nationalist era educational behaviors and symbols in Amis cultural terms was typical. Once the teachers joked during the flag raising ceremony that they should beat

the Aborigine drums when students march out from their classrooms for the flag raising and then add an Amis chorus to the national anthem (field notes, January 9, 2001).

Nothing bothered the principal more than Amis children who spoke quietly, shuffled their feet and did not look adults in the eye when speaking to them. She believed strongly that self-presentation, even one's handwriting, strongly affected one's ability to function in the world. And these lessons did not just apply to students. She was equally adamant about how teachers presented their public self. Of course, with teachers she focused on different things, such as how they wrote official memos and reports. Incorrect form would be scolded, but she also provided valuable lessons on how to deal with the bureaucracy. Her knowledge of proper form and procedure earned her respect at the Hualian Ministry of Education. When it came time to file all the applications for funding under the category of Schools in Remote Areas 偏遠地區學校 (*piānyuǎn dìqū xuéxiào*) throughout the county (and Hualian is one of the counties with the largest number of such schools in Taiwan), Principal Chen was put in charge of collecting, editing, summarizing, and even re-writing all of the reports. At the time she commented to me that many of the school principals did not know how to do this properly, making mistakes, not applying for all the money they qualified for, or simply not presenting their case in the correct bureaucratic language.

The principal was also very clear that she saw culture as a means of creating opportunities for the Amis, both by drawing state funds into the school, and also because of the opportunities presented to them through travel and competition. During one meeting with one of the top KMT officials in the county government, the drunken

politician proceeded to tell us, for some time, how he had come to understand that Aborigine's were the key to the whole province, but that they could only have power if they united. Obviously meaning that they should unite behind him. He told us how he had been going around to all the villages - dancing and drinking for nights on end. He had lots of plans and proposals, some of which he outlined, but the main plan seemed to be for some kind of a chain of Aborigine theme hotels, which would have playgrounds, hot springs, and hunting grounds! An aborigine guide would bring people in to where the (stocked) animals were, and would then hunt (with rifles because arrows are too dangerous). If they did not catch anything they could still buy meat to eat at the restaurant, otherwise it would be cleaned and cooked for them in traditional style. The main point being that at least 60% of the workers would be Aborigine. This is considered good, because then they need not go so far away to work. I asked the Principal what she thought of this proposal and all she said was that if they really hire 60% Aborigine workers that would really be something, and it would be good. (field notes, October 13, 2000).

There may have been some bitterness in the principal's response on this occasion, but this hard-nosed attitude in which creating opportunities for Aborigines came before any kind of cultural or identity based politics reflected a general attitude that could be seen in the integration of "local culture" into the school curriculum. Because, for the Amis, local culture often means "dance," I will look next at the role of Amis dance at Fountainhead primary school.

A Brief History of Amis Dancing

While the history of dancing amongst the Amis goes back beyond recorded history, it is known that during the Japanese era the Amis custom of dancing to entertain important guests became a regular feature of the hospitality extended to Japanese visitors.

such visitors included "tourists, representative of the railroad administration or the sugar factory or public servants" (this latter probably meaning, primarily, police officials), who would be entertained in each of the hamlets by its women's dance group beginning at dusk, with accompanying food and drink. The guest could choose, from among the dancers, the one he liked the best and she would eat and drink with him for the duration of the evening, which might go on until midnight. The visitor would be expected to give a present of money for the performance, which would later either be shared out among the dancers and their leaders or used collectively to buy materials for costumes, or for a collective feast, etc. (Thorne, 1997: 133, n. 92)

Such dancing also became a regular feature at official events organized by the Japanese colonial administration. For instance, 100 Amis danced when a royal Prince visited Taiwan in 1923, and again to "welcome the new governor" the following year (Thorne, 1997: 140).

The occasion which most Taiwanese today associate with Aborigine dancing is the Amis Harvest Festival 豐年祭 (*fēngniánjì*). In the early years of Japanese rule on the east coast of Taiwan, these traditional festivals were banned, in an attempt to promote Japanese religion and suppress local traditions. They later reinstated the ritual, but changed it in some very important ways: First, when it was revived in 1927, the traditional leaders of the event were replaced by the Japanese appointed *tomok*. Secondly, the role of women was increased relative to that of men, probably as a means of reducing the political power of male age-grade societies (*awid* in Amis). And, third, the object of

worship was officially changed to Japanese, as opposed to Amis, deities (Thorne, 1997: 132-33). After the KMT arrived many Amis converted to Christianity (see Chapter 5), and the Harvest Festival was initially banned by church leaders as superstition, only to be brought back later once Christian themes were integrated into the event (Chang, 1989: 92).

It was cultural tourism which finally secured the continued importance of Aborigine dance in Taiwan, including the Amis Harvest Festival. Aborigine dance had been an important part of domestic tourism since the 1960s when Atyal dancers at Sun-Moon Lake 日月潭 (*Rìyuè tán*), in the West, and Wulai 烏來 (*Wūlái*), in Northern Taiwan, would dance for tourists, the vast majority of such tourists were American soldiers coming and going from Vietnam (Thorne, 1997: 214). It was not till 1978 that the Amis began to organize collective dances in which several villages would come together to hold their Harvest Festival. Such events were still under the leadership of the *tomok*, and received government subsidies (Chang, 1989: 114). Now the festival is coordinated along the entire East coast, although it is becoming increasingly difficult to get younger members of the community to return from the city to participate. It is because of this history, linking Aborigine dance with tourism that dance has come to symbolize Aborigine culture for most Taiwanese, and to symbolize Amis culture in particular (Thorne, 1997: 216).

The Aborigine Cultural Exposition

There is an Aborigine joke that was told to me on at least two occasions during my fieldwork, both times by Aborigine school teachers. It describes an Aborigine man who has never been in the city before. He is tired and decides to stay in a hotel for the night. Because he does not have much money, he asks for the smallest room in the hotel. He is directed towards the elevator. Later, he is woken up by an angry clerk because he was found sleeping on the floor of the elevator! Having never seen an elevator before, he mistakes it for his room. The principal used this story when speaking at a conference associated with the Aborigine Song and Dance Cultural Education Exposition (原主民樂舞藝術祭: 文化教育展演觀摩活動, *Yuánzhùmín yuèwǔ yìshù jì: wénhuà jiàoyù zhǎnyǎn guānmó huódòng*) held at the Pingtung Aborigine Cultural Park (屏東原主民文化園區, *Píngdōng Yuánzhùmín Wénhuà Yuánqū*) at the end of October 2000. Before being assigned to Fountainhead village, Chen had previously been principal at an Aborigine primary school on the coast, and had won the national dance contest with the students of that school. This qualified her to take the students to an international dance contest in Singapore. She had also taken the children to perform in Japan. For her it was the ability to take the children to Pingtung County, Singapore, or Japan that was the most important aspect of participating in such competitions. Many Aborigine children never had the opportunity to leave the village they grew up in. Although Fountainhead village is a mere forty minutes drive from Hualian, an hour by train, some children had never been there. Principal Chen felt it was important for the students to be exposed to cities so that they would be able to function in the wider world without being afraid, or looking foolish like

the man in the elevator. In her talk she recounted a story of an Aborigine student on the trip to Singapore who did not know how to sleep in a Western bed. Instead of pulling back the covers to sleep under the sheets, he slept on top of the bed with the bed cover as a blanket. For the principal it was exposure to other cultures, and modernity, that was the most important aspect of such contests, not preservation of tradition (field notes, November 1, 2000). In Gramscian terms, it was a means of acquiring symbolic capital, and protecting the students from “symbolic violence” (Bourdieu and Nice, 2000: 170; Bourdieu and Passeron, 1990: 4)

The park where the cultural exposition was held was established in the 80s with the support of then provincial governor James Soong (宋楚瑜, Sòng Chǔyú), the park itself has something of an Epcot center feel, complete with tourist transport trolleys. There is a museum with Museum of Natural History style dioramas of each of the nine ethnic groups, and outside there are sample houses from each group as well. The event lasted two days, and was a celebration of all of Taiwan’s Aborigine cultures. At the opening ceremony there were nine young women dressed in the “traditional” attire of each of Taiwan’s nine officially recognized Aborigine ethnic groups⁹ (it was pointed out to me that the women themselves were not from each of these groups). All the dance performances were “traditional” dances, performed in “traditional” attire. There were only a few groups representing each of the different ethnic groups, as well as one professional troupe of Aborigine dancers who were much younger than the rest of the participants, and who performed some songs and dances which drew on all of the various Aborigine traditions, promoting a sense of Aborigine unity. This sense of unity was

exemplified by the song “We are all of the same family” (我們是一家人, *wǒmen shì yìjiārén*). Outside there were booths from each of the groups attending, at which various goods were being sold to help subsidize the cost of the trips. Each of the booths was different, some selling goods that were clearly identifiable as Aborigine foods or crafts, while others sold more modern goods, or even simply exhibited photographs and information about the attending schools. For instance, one booth documented the mother tongue language learning efforts of a school in Pingtung County.

The booth for Fountainhead was staffed mostly by Han Chinese women, some of whom had children performing in the Aborigine dance contest. It was here that I first saw Mr. Yang’s map, which was prominently displayed, along with old pictures from a book of historical photographs of the village that Mr. Yang had put together. In addition to these Han Chinese women, there was also a group of Amis Grandmothers who had come to perform in the contest. These grandmothers 阿媽 (*āmā*) were a rowdy bunch! The entire trip they were chewing betlenut, singing songs, and drinking a tremendous amount of rice wine 米酒 (*mǐjiǔ*). One of the Han Chinese teachers who had come on the trip, and with whom I shared a hotel room on the first night, was clearly upset at their behavior. You could still hear them dancing and singing late at night when everyone else was exhausted and going to bed. When asked why the older dance troupe was nearly all female (some of the other dance groups at the event were more balanced, or even mostly male), the teachers gave us two answers: “(1) The men aren't as involved. (2) Amis is a matrilineal society.” (field notes, October 31, 2000). Another, more likely, explanation is

that the men of that generation were no longer alive, or in poor health. Very few Aborigine men live to old age (see Table 2).

The Dance Contest

On December 19th, 2000 was the regional dance contest for the East Coast. Fountainhead did not win. The principal was clearly devastated, although she kept insisting that winning did not matter that much. The school that won was a school in one of the largest Amis settlements in the Rift Valley, a school that had devoted itself to promoting Amis culture for many years. But the students at Fountainhead had been training hard all semester, with the whole school dancing together during every break period. Although only the best dancers, and students (the principal kept pointing out that only those with good grades would be allowed to compete) were able to be on the team, the entire school participated in the practice sessions. The younger students clearly loved the excitement, and would sometimes dance as they went from class to class. A significant number of the dance team members were not themselves Amis, but were Han Chinese. This did not seem to detract from their enjoyment.

Even though Fountainhead Primary did not win the dance contest, the students had several other occasions to perform as a “troupe.” Such as at a regional Christmas celebration sponsored by local companies. Even if Aborigine identity received government and even corporate sponsorship, the student’s own choices were clearly for popular culture. At the end of the school year there was a student talent show, and the students spent hours and hours practicing dance moves they saw on television. These

were more reminiscent of the dance moves seen by the chorus on Michael Jackson's Thriller or Beat it videos than they were of Aborigine identity. The enthusiasm with which students practiced on their own for these performances contrasted sharply with the regimented way in which they were drilled in Aborigine dance. It was not so much that they did not care for Aborigine dance, they clearly enjoyed it. But they also knew what was "cool."

Learning "Local" Languages

Fountainhead's Languages

The difference between popular dance songs the students saw on TV and the Amis traditional dances they performed at school events makes clear the problems faced by efforts to preserve the Amis language. In a decentralized cultural market Amis must compete with not only other regional languages, but also Mandarin Chinese, which remains the national language and the language in which all classes are taught, as well as "global" languages such as English and Japanese, the two countries most responsible for manufacturing the cultural commodities consumed in Taiwan. For parents, the potential economic rewards of having their children learn Mandarin and English are far more attractive than those associated with preserving the mother tongue. Many parents raise their children in Mandarin, using their mother tongue only for speaking with their spouse when they do not want the children to understand. In some cases, especially in families where the parents are away and raising the children falls to the grandparents, the grandparents might speak to the children in the mother tongue, but the children usually

respond in Mandarin. Language maintenance seems to be strongest amongst Hoklo speakers, followed by Hakka, then the Austronesian languages, with almost zero retention of mother tongue amongst Mainlander immigrants (Tsao, 2001).

Sitting in the teacher's office of Fountainhead Primary School, the predominant language one hears is Mandarin. Mandarin is what teachers most often use with each other, with students, as well as what students use with each other. Occasionally a local visitor, such as a politician, or salesman, will come and will speak entirely in Hoklo with the teachers. Some teachers who share a similar ethnic background will speak to each other in their mother tongue, although such conversations are usually fairly short, lest they alienate any of the other teachers. Sometimes the children will use their mother tongue or one of the other local languages for dramatic or humorous purposes, but rarely will these be extended conversations.

It has not always been this way. From the 1930s till the 1980s, under both the Japanese and the KMT, local languages were banned. Students who spoke the local language would be punished in school – even if they were caught using the language off of school grounds! Interestingly, twice in the history of the school, Hakka became a semi-official language within the school. Right after the Japanese left, and before the KMT established its Mandarin language policy, classes at Fountainhead Primary School were actually taught in Hakka. Again, after the lifting of Martial Law, and before the arrival of Principal Chen (who is herself Amis), the school was under a Hakka principal, and Hakka became the language of the teacher's office, although not the classrooms. One Amis teacher who was there before the new principal came complained to me about how

this practice made her feel quite excluded. Although there is clearly a feeling amongst the non-Aborigine staff that the new principal favors Aborigines, they seem to prefer the atmosphere in the office these days to how it used to be.

Language Learning at Fountainhead Primary

Growing up, most teachers encountered only one linguistic market – Mandarin. Later, after the end of Martial Law, new markets started to open up, and some felt motivated to acquire linguistic capital in their mother tongue. Principal Chen was motivated to learn Amis after attending a series of weekend retreats, while another teacher learned Hakka after marrying into a Hakka family. While for some Aborigine teachers, such as the Principal, learning their mother tongue was clearly a political decision; there seemed little desire to promote mother tongue education amongst the younger generation. English was considered to be a much higher priority. English is one academic subject where there is the greatest discrepancy between rural and urban students. Urban students are more readily able to attend Bushibans to improve their English skills, and this gives them a clear advantage in one area over rural students. At present, native language skills have only limited value for further education, although plans are under way to make certain forms of Aborigine scholarships dependent upon language skills, as well as to make the system of adding points to the JCEE dependent upon language skills. However, with the demise of the JCEE this is surely to change as well.

Only one English language cram school was run in town. It was run by a teacher who had grown up in Fountainhead, but who had had the opportunity to study abroad for

some time in England and America. With his education he could easily have gotten a job in Taipei, but he was committed to helping out the children in his community. The school was paid for by the community on a collective basis, and spots were made available for poorer students who could not attend. In this way it was not unlike the traditional charity and clan schools of the Qing era. Most of the students were from the Han village, but some Aborigine students from the neighboring village attended as well.

In the neighboring Bunun village, the Presbyterian Church played an important role in teaching Bunun to the local children. However, in the Amis village the Presbyterian church was not so important. Most people attended the Catholic Church instead. While services were conducted both in Amis and Mandarin, with prayer books in Amis as well, Mandarin has come to be used more and more. The priest confided in me that he did not think native language education was very important anymore, and that the next generation of Amis would be better off learning English. He himself was Bunun and he divided his time between the Bunun Catholic Church and the Amis one. Still, for those few young people who did regularly attend events at the Catholic church, they were exposed regularly to both written and spoken Amis.

The 9-year Curriculum was just being phased in during the period I was in the field. Local language learning only took place within the context of the singing that accompanied the Aborigine dances. It was not until the next year that Amis, Hakka, and Hoklo would become official parts of the school curriculum. On a return trip I had the opportunity to observe an Amis class and a Hakka class. For these classes all the students were grouped together, regardless of grade. The Amis class involved learning songs in

which a few vocabulary words, such as animal names, were introduced. In the class I saw, which took place about half way through the school year, only those students who spoke Amis at home seemed to be able to sing the song and identify the vocabulary words. The other students just tried their best to keep the tune. The Hakka class, on the other hand, was more focused on reading and writing. Bunun was not offered yet even though there were a couple of Bunun students at the school. The principal said that they were making better arrangements for the Bunun students the following year.

Mandarin and English, on the other hand, were strongly emphasized. All students were encouraged to memorize the classic book of 300 Tang poems 唐詩三百首 (*Tángshī Sānbǎi Shǒu*). There are national competitions in student's ability to recite these poems, and principal Chen felt that those students who were able to memorize enough to do well would benefit from success on these exams. English at this time was only required from the fifth grade although it would eventually begin in third grade; however, the school was able to get support of the local community to hire a cram-school English teacher who taught all levels. During breaks and clean-up the tapes used by this school were broadcast throughout the whole school. When I returned the next year, the school had their own a full time English teacher and they no longer needed to sub-contract to the cram-school.

Opting Out

Of all the Aborigine teachers I met, only one used his Aborigine name. Mark, was teaching the first grade class at Betelnut primary school at the time I was doing my fieldwork, but he eventually left education. Mark was one of the most successful

members of his generation, having graduated from National Taiwan University's program in law. A remarkable feat considering that neither of his parents received more than a primary school education. However, he was not happy with a normal career, and was politically motivated to work to help "his people" in some way. He tried teaching, but was dissatisfied with the limitations of what he could do at the school, and opted instead to become a priest.

Mark's parents had grown up in the mountains. Mark's father still disappeared for days at a time up into the mountains, where he seemed to feel more comfortable than in their house in the village. Mark's mother did not understand Mark's obsession with study and travel, and wished he would settle down and marry a Bunun woman. She had stopped speaking to one daughter who had married a Han Chinese. She could not believe that her daughter would do well in such a marriage, assuming that she would simply be taken advantage of - that Han men would not treat a Bunun wife as an equal (field notes, March 28, 2001). Mark's family still owned land on top of the mountain, but national laws prevented them from farming it. The only cash crop they could grow was bamboo, the young shoots of which were valuable enough that during the harvesting season Mark's father would sleep in their section of the forest with a gun to defend against thieves.

Mark was also quite different from his siblings, who had failed to escape out of the bottom rungs of the working class. Mark's brother had previously worked in the mountains, opening up new land for development. He left that job after a dangerous fire broke out due to lack of discipline among the workers (field notes, April 23, 2001). He

then took a job at a factory on the east coast, but he had returned home again because his wife was pregnant with their third child.

Talking about being up in the mountains he said that there were two kinds of people: plains people, and mountain people. They each liked the life they were accustomed to, and it would always be that way. He is not a plains person. His brother [Mark], however, had already spent too much time in the plains, and wasn't really a mountain person any more. (field notes, April 23, 2001).

Mark admitted that he was no longer a “mountain” person. He tried to help out with protecting the family land up in the mountain from bamboo poachers, but his father told him that he was better off reading books.

Although Mark was long associated with the Presbyterian church, it was only in college that it became a central part of his life. He was not happy with the student organization for Aborigines at the university because it was dominated by Amis, who tend to be the most cohesive and organized Aborigine ethnic group, as well as one of the most numerous. He particularly objected to the implementation of an age grade ranking system akin to the one that was traditionally used to organize Amis men into work groups. He felt that this system was very undemocratic, as each age grade is traditionally expected to do whatever the older age grade asks them to do without questions (field notes, March 11, 2001). The Presbyterian church, on the other hand, gave him a network of friends whom, while not all Aborigines, treated him as an equal because of their religious beliefs (interview, March, 2001).

Joining the church had also given him an opportunity to travel. Mark has been to Europe, Africa, Southeast Asia and America. He is much more cosmopolitan and politically aware than any of the other teachers I met. He was aware of the limitations of

religion and the church, but he had clearly made a decision that joining the church was the most effective way he could make a meaningful contribution.

There are very few options available to Aborigine intellectuals. They can, like the principal, seek to work within the system, appropriating state funds to help impoverished communities; however, such a course of action means working within the ideological constraints of the compromise that had been worked out within the official school curriculum. Aborigine culture, within this curriculum, could only be defined within terms of the local community, effectively marginalizing and depoliticizing it. Only by opting out of the system, as Mark did, was it possible to openly promote an alternative view of Aborigine culture. Because Taiwan's political opposition were partners in the cultural compromise encoded in the new curriculum, the only institutional support for an alternative comes from within the Presbyterian Church.

Conclusion

Comparing local cultural performances, like the one I witnessed in Fountainhead when the American students came to visit, with multicultural events held in Philadelphia, one can see the similarities and differences in the two forms of Multiculturalism. Goode and Schneider describe how the ritual exchange of food and cultural performances in Philadelphia serves to push into the background important structural differences within and between communities:

The cultural-pluralism model has created externally defined groups who are encouraged to forget internal differences and to create and participate in homogenous cultural performances. Such presumably homogenous communities are expected to be joined to the larger society by official

representatives. The cultural-pluralism model is unthreatening. It states that the way to improve intergroup relations is to learn to understand and appreciate each other. It implies that problems emerge from lack of contact, lack of knowledge, and fear of strangers. It requires only that people experience each other's "cultures," learn more about teach other, and censor racist thoughts. Much of what is presented about other cultures reflects a narrow range of safe domains like traditional foods and music, thus avoiding dangerous topics related to values and morality. The cultural-pluralism model ignores the socially constructed racial hierarchy in the United States. It permits painless, enjoyable exercises and is practiced by all organizations, regardless of their agendas. (Goode and Schneider, 1994: 95, see also 179-180)

Multiculturalism in Taiwan shares with American multiculturalism a view of culture as a commodity to be exchanged through ritual performances, sharing of food, etc. However, Taiwan's multiculturalism's roots in Japanese traditions of localism, and a system of client-patron relationships maintained from the Japanese colonial era, means that it operates differently than American multiculturalism, with its roots in a history of slavery, immigration, and settler-state nationalism (Gran, 1996: 324). For Taiwan's Aboriginal intellectuals it means that they have a choice: either promote Taiwanese culture as a commodity in order to channel state funds, or to opt out of the system, working within alternative frameworks such as the Presbyterian church. The Hoklo cultural nationalism promoted by the DPP (see Chapter 6) does not seem to offer a viable alternative.

Notes

- ¹ Source for data on “all Taiwanese”: (Ministry of the Interior, 2004)
- ² Source for 1999 Aborigine data: (Directorate General of Budget Accounting and Statistics, 1999)
- ³ Source for 2000 Aborigine data: (Council on Indigenous Peoples, 2001)
- ⁴ Source for 2001 figures: (Council on Indigenous Peoples, 2001; Directorate-General of Budget, 2004; Ministry of the Interior, 2004)
- ⁵ Source for 1999 figures: (Directorate General of Budget Accounting and Statistics, 1999)
- ⁶ Junior College and above, including University.
- ⁷ For a discussion of the relationship between baseball and Aborigine identity, see Chapter 9.
- ⁸ See Chapter 6 of Lu Hsin-yi’s book *The Politics of Locality*, for a discussion of the role of “cultural-historical tourism” in the construction of Taiwanese identity (Lu, 2002: 135)
- ⁹ In 2000. As of 2004, there are now twelve officially recognized Aborigine ethnic groups, with some Seediq 賽德克族 (Sàidékèzú) still fighting for recognition as separate from the Truku.

CHAPTER 8
BETWEEN CONSENT AND COERCION: LANGUAGE, NATIONALISM AND THE
POLITICS OF CORRUPTION

Theorizing Nationalism's Failures

The study of language and nationalism tends to focus on its successes, on those writers and intellectuals who have so perfectly internalized the national ethos that they offer us a window on the soul of a nation. Less often do we explore the failures of linguistic nationalism; and when we do, we tend to focus on the coercive power of the state, as if the realm between consent and coercion was an empty no man's land, frequently traversed but never occupied. In nationalism failure is never the exception but the norm, for the contradictions inherent in any nationalist program mean that it can be only partially successful at best, incorporating some sectors of society while excluding others. Nationalism is only completely successful in the utopian imaginings of its adherents, never in its institutionalized reality. Drawing on an exploration of the differences in how Pierre Bourdieu and Antonio Gramsci theorize consent, I offer a theory of linguistic nationalism grounded in the political processes necessitated by nationalism's failures.

Both Bourdieu and Gramsci are known for their explorations of the middle ground between consent and coercion. In this middle ground coercion appears to actors as if it was consent. As Gramsci puts it, "Coercion is such only for those who reject it, not for those who accept it. ... One can say of coercion what the religious say of

predestination: for the 'willing' it is not predestination, but free will. (Gramsci, 1985: 130; Ives, 2002a: 330). Bourdieu termed this acceptance "misrecognition" in order to capture the process by which people come to accept the coercive forces of the marketplace as legitimate and natural (Bourdieu and Passeron, 1990: 38). For both scholars, the legitimacy granted to the forces of domination depended upon the socializing force of education, but it is here, in relation to education, that the differences in their two approaches is most apparent. Bourdieu emphasizes institutions such as schools, which establish the legitimacy of the dominant social norms through their ability to differentially reward those who accept this legitimacy. For Gramsci, who was grounded in his personal experiences dealing with Italian parliamentary politics and organizing worker's collectives in Turin, education was a *political* process, and political parties are themselves seen as an important socializing force. This difference of emphasis ends up having a profound effect on how the two theorists think about role of language and culture in defining a nation.

Bourdieu often uses the term "the cultural arbitrary" to refer to those cultural and linguistic forms embraced as legitimate by schools (1990: 9). It is the existence of such an arbitrary social norm, rather than its specific nature, which is important for his theory of *symbolic domination*. For Gramsci, however, there is nothing "arbitrary" about the choice of the dominant language or culture. These choices are always political, and as such they are the result of a historical process that includes negotiation, compromise, and the building of alliances between groups. Accordingly, Gramsci's theory of *hegemony* is

grounded in the political process of establishing consent, rather than the institutional process of reproducing it. This is a crucial difference for the theory of nationalism, for all nationalist projects are subject to a constant process of tearing apart and rebuilding, and any theory of nationalism must be as capable of explaining nationalisms failures as its successes.

Nationalism failures do not arise when the state must employ coercive means to quell dissent; they arise when coercion appears as such to the population. Gramsci saw the “normal” exercise of hegemony in parliamentary democracies as requiring attempts to “ensure that force will appear to be based on the consent of the majority” (Gramsci et al., 1972: 79, n. 49). Gramsci’s theory of hegemony grew out of his own obsession with the failures of Italian nationalism. He saw Italy’s failure to produce a genuinely national-popular culture as a direct result of the *Risorgimento*, when Cavour quashed Garibaldi’s popular uprising after it had served its purpose, reassuring the landowners that there would be no radical revolution, but only “molecular transformation” – what Gramsci called a *passive revolution*, highlighting its gradualism and elitism as compared with a popular revolution (Hoare and Nowell-Smith, 1972: 46). As a result, Italian culture remained more European and “cosmopolitan” than genuinely Italian, an alien culture imposed from above by the country’s intellectual elites (Gramsci, 1985: 27). He contrasted this with French culture, with its popular serial novels, national language, etc. For Gramsci the success of French nationalism was a direct outgrowth of the Jacobin

revolution, in which the bourgeoisie formed an alliance with the rural peasantry against the aristocracy (Gramsci et al., 1972: 77-80).

The result of Italy's failed revolution was a culture of corruption. He spoke of corruption as what lay in the realm between consent and coercion, and as being typical of those situations where "it is hard to exercise the hegemonic function, and when the use of force is too risky" (1972: 79, n. 49). In the context of this note, Gramsci is talking about acts of bribery and fraud, but I would like to suggest that the notion of corruption be extended beyond mere graft to include language, culture, and ideology as well. In the context of Bourdieu's theory of linguistic markets we already have a notion of culture as a form of corruption. Bourdieu had to explain how it was that linguistic markets could serve as a mechanism for the reproduction of class relations when the possibilities for social advancement are necessarily fewer than the number of people who possess the correct form of cultural capital. He proposed that "the controlled mobility of a limited number of individuals can help to perpetuate the structure of class relations" (Bourdieu and Passeron, 1990: 54). Bourdieu's approach suggests that of game theory, in which group behavior is accounted for in terms of the cumulative calculations of all individuals in the group. It is enough for a few members of a class to succeed on the basis of their cultural capital for the class as a whole to continue to view the market itself as legitimate. The problem with such a game theory approach is that it does not provide an account of how such a market came to be viewed as legitimate in the first place. Why do not markets more accurately reflect the cultural capital actually possessed by the majority of the

population? Bourdieu can only tell us that it is not in the interests of the elite, but Gramsci's focus on the historical process of state formation provides us with a model in which the shifting political fortunes of allied groups can be linked to the institutionalization of related forms of symbolic capital.

This is not to imply that Gramsci would ascribe a simple one-to-one correspondence between changes in elite composition with changes in linguistic markets, although there are some interesting insights that can come out of such an analysis (Tollefson, 1993). Central to Gramsci's "differential analysis of the structures of bourgeois power in the West" (Anderson, 1977: 20) is a theory of how competing class interests congeal through the political process and come to be universalized in the hegemonic ideology of the state. The success of French nationalism derived from the process by which Jacobins were forced to "widen [their] class interests and to discover those interests which [they] had in common with the popular sectors" (Mouffe, 2002: 295). This contrasts with the Italian passive revolution, in which the urban bourgeoisie in the North formed an alliance, not with the southern peasantry, but with the southern aristocracy. Gramsci refers to such alliances as *historical blocs*, and their creation serves to tie the interests of subaltern and hegemonic groups. It is in the political process of forming such alliances that nationalism takes shape. This sets Gramsci's theory of the realm between consent and coercion apart from that of Bourdieu. Because Bourdieu lacks a theory of the political process by which the cultural arbitrary is formed, he naturally assumes that there is an unproblematic relationship between the interests of the dominant

culture and those of the ruling class (Bourdieu and Passeron, 1990: 9). For Gramsci, on the other hand, the particular form of nationalist culture that emerges from the creation of a historical bloc does not simply reflect the interests of the dominant group, but also those of the subaltern groups, which are tied to it. While, for Gramsci as much as for Bourdieu, a groups' intellectuals (a broad category which includes school teachers, clergy, politicians, and technocrats) are the key to its cooptation into a particular hegemony, Gramsci understood that this process was not a transparent one. The incorporation of a subaltern group has its effect on the very nature of hegemony, and upon the language and culture of nation, which serve to legitimate it.

While Gramsci has been frequently invoked in discussions of linguistic nationalism, there is a certain tendency to elide these important differences between his theory of hegemony and Bourdieu's theory of symbolic domination. Bourdieu's theory has been fruitfully applied to explain how subaltern groups come to embrace the dominant language and culture, even when doing so devalues their own cultural and linguistic traditions. In his discussion of *linguistic markets* Bourdieu offers a mechanism by which such linguistic values are reproduced. Possession of the correct form of linguistic capital can provide access to jobs and social networks in which other forms of capital can be acquired. However, anthropologists seeking to apply Bourdieu's model have quickly run up against its limitations. In Kathryn Woolard's seminal article, "Language variation and cultural hegemony" (Woolard, 1985), she takes Bourdieu to task for placing undue emphasis on the dominant linguistic markets controlled by state

institutions, such as schools. Drawing on the example of Catalan in Spain, she points out that civil society can be an equally important site for the creation of symbolic value, and that these informal markets may not reflect the same language attitudes as those controlled by the state.

Since Woolard's book, other authors, such as F. Niyi Akinnaso (Akinnaso, forthcoming) and Niloofar Haeri (Haeri, 1997), have extended this argument, showing how in Nigeria and Egypt the state and civil society had very different roles in the creation and maintenance of linguistic markets. What emerges from this ongoing dialog with Bourdieu is a move to a more Gramscian approach, one in which the historical processes that shape linguistic markets are given analytic priority over the institutional process of reproducing them. Haeri explores the impact of globalization on language markets in Egypt:

In Egypt, one of the consequences of the global economy is a segmentation of the labor market that has produced a demand for proficiency in European languages. The increase in the number of foreign-language private schools has meant, among other things, that Egypt now has two educational systems. Public state schools cannot satisfy the demand for highly skilled foreign-language-proficient labor, in part because the colossal state bureaucracy needs to fill its own ranks with their graduates. Hence, some state institutions reproduce values for the official language, while others pursue goals and policies that marginalize the currency of that language. (1997: 796)

And in Akinnaso's work the legacy of colonial state formation has left a patchwork of hierarchically related language markets:

Yet another reason for lack of congruence between policy and practice in Nigeria is the shifting locus of power across federal, regional, and local contexts and from State institutions to traditional administrative

institutions. ... Thus, the dominant group in one context or institution may become powerless in another, and, therefore, be subject to a different set of linguistic values. Ultimately, then, the idea of a dominant language or a dominant linguistic value is relative. (Akinvaso, forthcoming: 58)

This view of language markets as segmented and divided by the same political and economic forces which shape nation building and economic markets expands on Bourdieu's original formulation by revealing the complex "variations in market conditions and competition between markets" overlooked by Bourdieu (forthcoming: 12). What I am arguing for by emphasizing Gramsci's theory of history as a means for reconceptualizing Bourdieu is a view in which the extent to which such variation and competition is allowed or encouraged is seen as essential to understanding the structure of a particular hegemony. I believe it is the underlying logic by which languages interrelate, rather than the specific value of any particular language that is key for understanding the nature of a specific linguistic hegemony. In Gramscian terms this relationship between languages can be seen to be a product of the political alliances underlying the ruling historical bloc, and thus reflecting the interests of both the junior and senior partners in this alliance. Changes in the logic of the market can, in a Gramscian perspective, signal shifts in the nature of the ruling bloc. It is exactly such a shift that is now happening in Taiwan's linguistic marketplace, and I argue that only a proper historical account of the shifting nature of Taiwan's ruling historical bloc can allow us to provide a meaningful explanation of these linguistic changes.

Before exploring the application of Bourdieu and Gramsci in the Taiwanese context, I first explore in greater depth Gramsci's theory of nationalism. Specifically, I

look at Gramsci's embrace of linguistic nationalism for Italy in light of debates over the role of "modernity" in nationalism. Language modernization is a key component of most nationalist programs, and Gramsci was no exception in his desire to unite Italy under a single language. However, I argue that his hopes for modernization must be contextualized within his larger body of work, especially the links between his early linguistic work and his theory of hegemony. I then clarify the relationship between Gramsci's theory of historical blocs and nationalism by clarifying the differences between my approach and that of Partha Chaterjee. Chaterjee uses Gramsci's theory of passive revolution to argue that post-colonial nationalisms are not inherently anti-modern. However, because Chaterjee's focus is on those paradigmatic thinkers who best expressed Indian nationalist ideology at various stages in its development, he overlooks the role played by subordinate partners of the ruling historical bloc in shaping that ideology. As a result, and by his own admission, he over generalizes from the Indian case, obscuring the tremendous variation inherently possible within Gramsci's theory of passive revolution. Having thus clarified Gramsci's theory of nationalism, I then proceed to elaborate on the above-mentioned discussion of Bourdieu's theory of language markets, before tackling the application of both of these concepts in the Taiwanese context.

Gramsci, Nationalism, and Modernity

Gramsci embraced linguistic unification as a means of empowering Italy's subaltern groups (Gramsci, 1985: 182). But it would be a mistake to make too much of this,

without placing Gramsci's endorsement of Italian linguistic unification within the context of his larger body of work. As with his endorsement of American "Fordism," which he saw as key for the salvation of the Italian worker, Gramsci was able to embrace some elements of modernization as liberating while simultaneously critiquing the power relations upon which modernization was founded (Gramsci et al., 1972: 312). He attacked those plans for linguistic modernization not firmly grounded in the daily practices of the Italian people. Writing against the adoption of Esperanto as the national language of Italy, which was being advocated at the time, Gramsci argued that the "history of the fortunes and diffusion of a given language depend strictly on the complex social activity of the people who speak it" (Gramsci, 1985: 27). Gramsci's endorsement of linguistic nationalism was not a desire to see an artificially imposed national language, but the creation of a genuinely national-popular culture, which would unify the divided Italian underclass. He draws a comparison between the history of French and Italian written vernaculars:

Evidence of the origin of the historical differentiation between Italy and France can be found in the Strasbourg oath (around 841), namely in the fact that the people participated actively in history (the people-army) by becoming guarantors of the observance of treaties between the descendants of Charlemagne. ... In Italy the first vernacular documents are individual oaths for establishing ownership over certain monastery lands or they have an anti-popular character (Gramsci et al., 1972: 227).

Gramsci bemoaned the lack of a popular vernacular literature in Italy comparable to the work of Alexander Dumas (Gramsci, 1985: 355). At the same time, as a victim of Italian Fascism, Gramsci was well aware of the limits of national-popular culture. His advocacy

of a modern, cosmopolitan, nationalism was a reaction against the backward-looking nationalism of the Fascists:

Nationalism of the French stamp is an anachronistic excrescence in Italian history, proper to people who have their heads turned backwards like the damned in Dante. The ‘mission’ of the Italian people lies in the recovery of Roman and medieval cosmopolitanism, but in its most modern and advanced form (Gramsci et al., 1972: 247).

What we see here is an essential tension in Gramsci between his endorsement, on the one hand, of revolutionary internationalism, and on the other the particularism of his historical approach which called attention to the unique characteristics of hegemony in Italy and the unsuitability of a Russian style revolution in the “advanced” capitalist societies of the West.

This tension that we see between Esperanto and Italian, between cosmopolitan nationalism and a nationalism rooted in the past, and between global revolution and a specifically Italian revolution, is fundamentally a tension between modernism and its critique. For Jürgen Habermas, such tensions are inherent in all nationalist projects. For Habermas, nationalism exists to solve a particular problem associated with the process of state formation. As the modern state replaced feudalism, the basis of legitimation for the state shifted from residing in the personal authority of the royal family to the “popular sovereignty” of the people, who are now “authors” as well as “subjects” of the law (Habermas, 1996: 285). This created a problem, especially for central European states, which did not exist as coherent territorial entities before their transformations, since the concept of popular sovereignty is, according to Habermas, simply not powerful enough to

mobilize the people to fight for such a transformation. They fight, not just for individual freedom based upon a concept of universal rights, but for the particularistic freedom of a “cultural community bound together by origin and fate” (1996: 287). This is a reasonable functionalist account of the role played by nationalism in the emergence of at least some nation-states (even Habermas admits that this model does not necessarily apply to Western European states, or the United States (1996: 283, 286)), but it fails to provide a credible account of why nationalism works. For Habermas, the success of nationalism relies upon its dependence on “prepolitical” facts, on the “quasi-natural features of a historical community” (1996: 287). It is true that such quasi-natural features are the building blocks of nationalism, but it is a gross mistake to assume that the decision as to how to employ them in the construction of a national identity are somehow “prepolitical.” To do so is to ignore the fact that nationalism is always the outcome of a political process. Habermas’ utopian vision of a nationalism grounded on nothing more than a shared legal tradition seems to be based on the assumption that such prepolitical holdovers as “culture” can be simply swept aside; but, if we understand nationalism as constitutive of the modern state, it will become clear that cultural traditions cannot simply be swept aside.

Habermas’ distinction between irrational premodern nationalism and modern, rational-legal citizenship is exactly the sort “liberal dilemma” Partha Chatterjee accuses modern Marxist theorists of nationalism of falling into. He calls this “sociologism”:

fitting nationalism to certain universal and inescapable sociological constraints of the modern age, or alternatively, reducing the two

contending trends within nationalism, one traditional and conservative and the other rational and progressive, to their sociological determinants (Chatterjee, 1986: 22)

Chatterjee attempts to work his way out of this dilemma by separating the underlying logic of nationalist thought from its particular forms. In his terms, this calls for an analytic separation of the “thematic” aspects of nationalism, its “epistemological as well as ethnical system,” from its “problematic,” those “concrete statements about possibilities justified by reference to the thematic” (1986: 38). This allows him to argue that the thematics of post-colonial nationalism, their underlying justificatory structures, are universally modern, even if their particular problematics embrace premodern forms. This is not to say that the thematics of post-colonial nationalisms are Western, but simply that they are constructed in dialog with the discourses of Western modernity. In fact, they must differentiate themselves from colonial thought, even as they adopt “the modes of thought characteristic of rational knowledge in the post-Enlightenment age” (1986: 41).

Chatterjee draws upon Gramsci’s theory of history and revolution to provide an “analytical framework in which the ideological history of the Indian state can be studied” (1986: 30). Chatterjee makes it clear that Gramsci’s theory of history does not provide a blueprint, universally applicable to all modern nation-states, but derives its strength from an analysis of the tensions, which always exist in the process of forming such states. In particular, Chatterjee highlights the tension, in Gramsci, between popular radical movements such as the French Jacobins, and gradualist movements, such as the passive revolution in Italy.

The equilibrium that would result from the struggle between these two tendencies was in no way predetermined: it depended on the particular ‘moments’ of the relation of forces, especially on the relative quality of the ‘subjective forces’ which provided the political-ideological leadership to each tendency. (1986: 46)

Accordingly, Chatterjee sees his task as tracing the balance of power between these two tendencies through an examination of Indian nationalist thought at various historical “moments.” As a result, Chatterjee’s analysis of the development of Indian nationalist thought is oddly Hegelian, focusing on the internal contradictions of various systems of thought, with seemingly little desire to engage in the type of historical analysis he lauds Gramsci for doing. Thus he asserts that India represents a “*paradigmatic*” example of Gramsci’s theory of “passive revolution” (emphasis in original, 1986: 49), even while admitting that supporting such a claim would require a study of “several” such “historical cases of ‘passive revolutions’” (1986: 30). He is able to do this because the tensions he identifies reside purely at the level of ideology, and are not grounded in a theory of “historical blocs” as they are in Gramsci’s writings.

In order to understand how Gramsci understood the tension between the universal rational-legal values of modernity and the particularistic national-popular culture he thought was necessary to liberate Italy, we must return to the linguistic roots of his theory of hegemony. Peter Ives has argued convincingly that Gramsci’s theory of hegemony grew out of his college studies in linguistics. Much of his writings in the notebooks were concerned with the tension between “normative” and “spontaneous” grammar, but even

more importantly, Ives argues, was his distinction between genuine and artificial normative grammars:

Instead of the opposition between spontaneous consensus and forced coercion, Gramsci is formulating a distinction between those normative grammars that truly express or are successful in creating a “national popular collective will” and those that are not successful but instead need to be imposed and enforced. That is to say, the normative grammar of a popular unified national language is different from an artificial, Manzonian-style language. The normative grammar is the result of only a passive revolution which exists due to the disunity and incoherence of various existing spontaneous grammars. Like the role of “organic” elsewhere in the Quaderni, Gramsci uses immanent or spontaneous grammar to determine the gradation or the type of normative grammar, or of hegemonic relationship. (Ives, 2002b: 223)

Ives argues that, for Gramsci, the goal of the workers movement was precisely to relieve the tension that exists between spontaneous and normative grammar, and that this could be done only “by paying careful attention to the process through which the normative grammar is formed and maintained” (2002b: 223). The incomplete nationalism brought about by a passive revolution always relies on a certain degree of coercion (as well as, as we argue above, corruption). And while Gramsci seems to have truly believed that an “organic” national-popular culture could possibly emerge, he understood that it would take a political struggle to create the conditions under which this could happen. He also firmly believed that it was necessary to make the implicit explicit, and to educate the public as to the normative structures underlying popular culture (Gramsci, 1985: 186-87). Gramsci’s belief that an “organic” culture could emerge from below seems to suggest both a lingering belief in some kind of primordial Italian culture, and a belief that this culture is directly linked to the interests of the subaltern classes. But, even here, Gramsci

clearly understood the constructed nature of such a culture, and the need to build it up by creating “organic intellectuals” who are able to articulate and generalize the interests of the subaltern classes (Salamini, 2002: 70). (Gramsci’s theory of intellectuals is discussed in Chapter 7.) Moreover, the subaltern interests that this culture represents would not simply be those of the “working” classes in general, but would transcend divisions within the subaltern classes. In Gramsci’s writings on the “Southern Question” he argued that one of the essential features of Italian hegemony was the division of the industrial working class in the North from the Southern peasantry (Gramsci, 1957). A genuinely national-popular culture would represent subaltern class interests by facilitating the types of political action necessary to overcome such divisions and realize their shared interests.

Linguistic Nationalism as Symbolic Domination

The appeal of Bourdieu’s theory of *symbolic domination* for the study of language policy is obvious. Bourdieu offers an explanation of why language policies matter (Bourdieu, 1991). By granting official status to one language as opposed to another, language policies assign more *symbolic value* to one language (or language variety) as opposed to another. This necessarily benefits those who have greater mastery of the official language, enabling them to cash in their *linguistic capital* in the economic and political spheres. It also explains why those who lack mastery of the official language might still value it over their own mother tongue; because, those same linguistic markets devalue their own language. In this sense, Bourdieu’s theory of ideology is remarkably similar to that of

Marx, who located ideology in the very nature of exchange relations¹ (Hunt, 2002: 460). For Marx, the free exchange of goods gives the illusion of equality, masking the real power inequalities within the sphere of production (Marx and , 1977: 163-77). Similarly, Bourdieu's theory employs the market metaphor, not to suggest that symbolic goods can be freely exchanged in the marketplace in the same way as capital, but to highlight the inequality in the symbolic resources with which we come to the marketplace. While, symbolic goods are not directly exchangeable in Bourdieu's model, their employment can be used to secure a better job, political power, or higher social standing; however, unlike money or goods, we still possess as much linguistic capital after the exchange as we did before it. Symbolic capital is something that we acquire throughout the course of our daily lives. It is part of who we are, of what Bourdieu calls the *habitus*, or, in John Thompson's words, the "*dispositions* which incline agents to act and react in certain ways" (Thompson, 1991: 12). Because the system by which symbolic value is created and reproduced is invisible to participants in the process, they come to misrecognize this value as something intrinsic to the symbolic capital itself. Thus, speakers of the most valued language are seen as possessing other desirable traits, such as intelligence and grace.

Bourdieu's theory is an excellent explanation of the role played by culture in the reproduction of social inequality, particularly with regard to the internalization of dominant cultural traits by the subaltern classes. But his focus on the role of educational institutions, and *pedagogic authority* in the creation of symbolic value leads him to take

as given the legitimacy of those institutions (Bourdieu and Passeron, 1990: 41). While Bourdieu is aware that there exist alternative markets in which other forms of symbolic value are valued over those officially endorsed by the state, such as among Algerian intellectuals under French colonialism (1990: 29), he sees these alternative markets as spaces where “the rule of the legitimate language is merely suspended, not transgressed”(Woolard, 1985: 743). For Bourdieu, “there are never any really counterlegitimate languages” (1985: 743). Kathryn Woolard provides an excellent counter-example in her study of Catalonia, Spain (Woolard, 1989). There, she found that

While the Francoist government did succeed in imposing the domination of a centralized (and increasingly multinational) finance capitalism over the Spanish economy, it stymied but did not obliterate the regional economic dominance of the Catalan bourgeoisie. Catalans continue to dominate the internal economic structure of Catalonia (which contributes significantly to that of Spain). Although the Castilian language was successfully imposed by state institutions as the means of access to functionary positions, Catalans continue to be predominant in ownership and management of the private sector, which is still characterized by small and mid-sized industries (Woolard, 1985: 742).

As a result of this historical process, and the continued power of the Catalan bourgeoisie, Catalan is valued much higher than the official Castilian language. This is true even among the industrial workforce, the majority of which does not speak Catalan (1985: 742).

Woolard argues that “authority and hegemony cannot be mechanically read out from institutional dominance” (1985: 743), and that the “coincidence of political, civil, and economic dominance” can obscure “the processes by which such hegemony is actually consolidated” (1985: 742). She urges an emphasis on “primary relations,

face-to-face encounters, and the invidious distinctions of informal, everyday life” (1985: 743) as the primary forces shaping linguistic markets in “the Western bourgeois state” (1985: 742). By “primary relations” she means especially the “primary *economic* relations” which shape our everyday life (emphasis added, 1985: 742). In emphasizing economic relations over the role of institutions such as education, Woolard is asserting the importance of civil society over that of the state in the construction of linguistic markets. While there is no reason to doubt the veracity of this claim for the Catalanian example she discusses in her work, there are three problems associated with the elevation of such an example to the status of a general rule: First, it is not clear that it can reasonably taken as a rule for all “Western bourgeois states,” if we can even assume that there is such a single model that uniformly applies to all countries in Western Europe and North America (Gran, 1996). Second, it leaves open the question of what role the state might play in shaping language policy outside the West. Third, and most importantly, it leaves open the question of the how the relationship between state and civil society might affect linguistic markets. I argue below that the “process by which hegemony is actually consolidated” in any given state involves the forging of a particular relationship between state and civil society, the nature of which is always contested. To assume the primacy of one realm over the other is to risk abandoning the task of analysis before it has even begun.

F. Niyi Akinnaso’s analysis of language markets in Nigeria takes up Woolard’s discussion of alternative linguistic markets, but provides an example of the important role

that can be played by the state in the construction even of such “alternative” markets. The process of colonial state formation influenced not just Nigeria’s continued reliance on English as a national language, but also left its mark on regional language markets in which Nigeria’s other languages compete with English for legitimacy.

This imperial process of State formation has had several implications for language management, notably, (a) the evolution of new political and economic systems of dependency and inequality in which languages and their speakers were forced into relations of stratified diversity; (b) a dual pattern of colonialism and stratification; and (c) a segmented labor market which generated complementary, even sometimes opposing, demands for proficiency in different languages. (Akinnaso, forthcoming: 59)

The complex history of alternative markets discussed in the work of Akinnaso, Haeri and Woolard “calls into question the linear association between the official language, the State, the dominant class, and power which underlies Bourdieu’s theory of symbolic domination” (forthcoming: 59).

Bourdieu, all too often, seems to suggest that the official policies of the state, or more precisely, the cultural arbitrary that such policies promote, reflect the “objective interests (material and symbolic) of the dominant groups or classes” (Bourdieu and Passeron, 1990: 9). I believe that it is with this conception of ideological domination as being relatively easily and unproblematically mapped on to class relations that the problem lies, rather than in Bourdieu’s focus on state institutions per se. As James Collins reminds us, “the vagaries of publication and translation” have limited the scope of what English speaking audiences are able to read of Bourdieu until quite recently, thus ignoring the more “nuanced account of class relations and symbolic practices” in his

other work, such as *Distinction* (Bourdieu, 1984; Collins, 1997: 807). Moreover, the problem is not with Bourdieu focusing too much or too little on the state, as opposed to civil society, but on his failure to historicize that relationship.

There is a danger in making too much of the state-civil society dichotomy. It arises, Gramsci tells us, from a “false distinction in liberal theory, which assigns economic activity to the sphere of civil society in order to place it beyond the reach of government regulation” (Buttigieg, 1995: 445).

Gramsci identifies two major flaws with liberal theory, whose main thrust is to legitimize and justify a “free-market” system: (1) it is based on an economic concept of the state and civil society; and (2) it contradicts reality, since “laissez-faire liberalism, too, must be introduced by law, through the intervention of political power: it is an act of will, not the spontaneous, automatic expression of economic facts” (1995: 445-46).

For Gramsci, and, I would add, for Bourdieu, civil society is “is best described not as the sphere of freedom but of hegemony” (1995: 427). As Joseph Buttigieg puts it, “The acquisition of a hegemonic position in civil society is ultimately more important to the ruling classes than the acquisition of control over the juridico-political apparatus of government” (1995: 448). When the ruling classes control the state, as in the Nigerian case, they will certainly use that control to seek consent in the realm of civil society, but where specific sectors of the ruling class do not have such control, as in Catalonia, then necessarily they will seek legitimacy and consent through other means.

The problem is not that the theory of symbolic domination or hegemony stresses either the state or civil society, but with attempts to discuss ‘the state’ or ‘ruling classes’ as if these were unproblematic categories whose referent was immediately apparent.

To assume that states would always find in linguistic hegemony more power to be harnessed to their advantage is to assume a chain of historical relations among the state, the dominant groups, and symbolic capital that is predictable and timeless. Specifically, it means assuming that the state has no rivals in its claims to the symbolic capital of the official culture of the country and that that symbolic capital would simply reinforce rather than challenge its hegemony. I would argue that there may be historical and ideological constraints in realizing that wish. At the very least, the state has to struggle to make the hegemony of the official culture beneficial to its own interests (Haeri, 1997: 801).

Haeri's statement of the problem is clear, but James Collins is correct to take her to task for failing to note that a suitable solution already exists in the work of Antonio Gramsci (Collins, 1997: 807).

Conclusion

As we have already discussed, Gramsci's understanding of hegemony does not entail a simplistic assumption of a perfect fit between class interests and what Bourdieu refers to as the "cultural arbitrary," moreover, it is firmly grounded in the historical process by which specific sectors of the ruling classes forged a historical-bloc with other ruling groups, and even with certain elements of the subaltern classes. At the same time, it is important not to discount the importance of Bourdieu's focus on the actual mechanisms by which the cultural arbitrary is inculcated into the habitus of the subaltern.

Notes

¹ Hunt correctly grounds Marx's theory of ideology in his structural analysis of commodity relations, but Hunt's economic reductionism ultimately blinds him to the utility of Gramsci's historical approach. A structural analysis of class relations is insufficient to explain the differences between various forms of hegemony.

CHAPTER 9

CONCLUSION: WHAT TAIWAN CAN TEACH US ABOUT LINGUISTIC NATIONALISM

While the proximate cause of my research was the announcement of Taiwan's new 9-year Curriculum, this dissertation was equally motivated by the theoretical questions concerning the relationship between language and nationalism (discussed in Chapters 1 and 8). Specifically, what is the relationship between linguistic markets and linguistic nationalism? In order to answer that question I have drawn extensively on the work of two scholars: Pierre Bourdieu and Antonio Gramsci. The former because his theory of linguistic markets offers an explanation of the mechanisms by which linguistic ideologies are reproduced, and the latter because he offers us a way of linking linguistic ideology to wider political and economic processes. I have accordingly focused tremendous attention on the political and economic processes by which ethnic and state formation took place in Taiwan, following Gramsci's model of focusing on the process of alliance formation between elite and subaltern groups.

Theoretical Implications

One of the dominant approaches for studying nationalism has been to construct taxonomies. These taxonomies can be useful in terms of constructing various ideal types that can serve as a framework for empirical investigations, but in terms of actual

implementation these taxonomies often break down. We can see an example of the strengths and limits of such a taxonomic approach in Benedict Anderson's essay "Western Nationalism and Eastern Nationalism: is There a Difference That Matters?" (2001). In trying to categorize Taiwan, Anderson evokes three different kinds of nationalism: creole nationalism, official nationalism, and linguistic nationalism. This is useful, in that each of these ideal types teaches us something about Taiwanese nationalism. It is certainly "creole" in the sense that Taiwanese nationalism is a "demographic blending of settler and indigenous peoples" (2001: 33). Under both Japanese rule and during the early years of KMT rule, official nationalism declared Taiwan to be a part of a larger nation-state (Japan or China), and language was central to this policy. But what does it mean to say that Taiwan has been a product of three types of nationalism? What do we need to understand is the ways in which each of these types of nationalism were applied in Taiwan, by whom, and to what effect? And in order to answer those questions we must have a theory of Taiwanese history, a theory of how power is wielded in Taiwanese politics. Political power, economic power, and linguistic power. It is for this reason that the works of Pierre Bourdieu and Antonio Gramsci have been so important for this work. In Chapter 8 I discussed some of the differences between their approaches. Now, in conclusion, I would like to discuss what it is that the Taiwanese case can teach us about their theories.

Language Markets

In Chapter 8 I criticized Bourdieu for focusing too much on issues of social reproduction, and ignoring the important role that political processes play in shaping (and reshaping) linguistic markets. This is not to be understood as a blanket rejection of Bourdieu's theoretical contributions. Quite to the contrary. The theory of linguistic markets is still useful if we understand that there is competition both within and between linguistic markets. In the Taiwanese case there is only one *official* linguistic market, the market shaped primarily by language-in-education policy, but also in policies pertaining to language use in government (such as the civil service examinations discussed in Chapter 5). However, there are also alternative language markets, such as those one might find in the marketplace, where one is more likely to hear Hoklo than the official Mandarin (see Chapter 2). In this regard there are two important trends. The first was that started in 1990, by which the control of the central government over dictating official language policy was weakened. This process of decentralization allowed for local markets to assert themselves more forcefully (Wu, 2004). Thus, the relationship between the official and local linguistic markets was transformed, without threatening the status quo of the official market. The second development was the transformation of the DPP from an opposition party to a ruling party. With a tenuous hold on power, the DPP had only a limited mandate, and linguistic nationalism was one tool at their disposal for shoring up that support. This meant moving beyond decentralization of linguistic markets to attempting to transform the official language market itself. Efforts to replace Mandarin with Hoklo

(such as on the civil service examination) were quickly rebuffed, but more subtle gestures, such as establishing a uniquely Taiwanese orthographic system in Tongyong Pinyin have been more successful.

Each of these transformations in Taiwan's linguistic markets poses both hopes and challenges for Taiwan's Aborigine population. Chinese linguistic nationalism during the first half of the twentieth century hurt Austronesian languages more than other languages, due to the small size of their speech communities, and their lack of political and economic power, yet, for the same reasons, decentralization of language policy does not hold out much hope for these dying tongues. Forced to compete with other Taiwanese languages, Austronesian languages will surely lose out. Token gestures, such as the introduction of a mere two hours of native language education each week, will do little to reverse a century of decline. The result of these changes has been the creation of a linguistic hierarchy, in which local language markets must compete with each other. The markets for Austronesian languages are at the bottom, with those of the least populous Aboriginal groups ranked at the very bottom. Also at the bottom might be included the languages of foreign brides, as more and more Taiwanese men marry women outside of Taiwan (Lu, 2003a).

But what is the language at the top of the hierarchy? I have argued (see Chapter 5) that as the result of both Globalization and Taiwan's long history of close relations with the United States, this language might now be English, rather than Chinese. Although other East Asian languages, such as Japanese and Korean compete with Chinese as

regional languages, English remains the dominant global language. In the Taiwanese movie *Yi Yi* (Yang, 2000), we see a meeting between a Hoklo speaking Taiwanese businessman and a prospective Japanese partner. This meeting takes place entirely in English. To the same extent that speaking in Hoklo is associated with provincialism, as in the use of Hoklo in television advertisements for folk health remedies, English is associated with an international perspective. The most prized hosts on Taiwan's version of MTV are those raised and educated in the United States, like David Wu 吳大維 (*Wú Dàwéi*), whose very Americanness is one of his biggest selling points (there are even David Wu branded English teaching materials). Taiwan is not a situation, such as described by Niloofar Haeri in Egypt (Haeri, 1997), where English has displaced the official language of the upper classes – Chinese is still a necessary part of Taiwanese social life – but ease in English speaking environments is as important as perhaps French once was for some members of the Russian aristocracy.

This picture of multiple linguistic markets, at the local and global levels, competing with the official language market of the state is quite different from what Bourdieu observed in France. As Haeri points out,

Bourdieu himself, writing on the language situation in France after the Revolution, speaks of the “anonymity” of the emerging standard French and of the “aristocracy, the commercial and business bourgeoisie and particularly the literate petite bourgeoisie” who had more access to the official language but who spoke their own dialects. (Haeri, 1997: 799)

It is not necessary to abandon Bourdieu, simply to historicize him, to locate language markets within political and economic frameworks at the local and international levels,

and to see language markets as constantly changing and evolving in relationship to the same political processes which shape, and are shaped by, power relations at each of those levels. In order to do this I have found it useful to turn to the work of Antonio Gramsci.

Historic Blocs

One of the hidden agendas of my work is to contribute to an understanding of world history (Gran, 1996) which moves beyond a paradigm of “civilizations” (Huntington, 1998), beyond East and West, to see Taiwan in terms that do not mystify our understanding of its own history with concepts such as “Confucian morality.” This is not to say that culture does not play an important role in Taiwanese society, but that culture itself must be understood as part of a political process. Nor is this to reduce culture to politics, but simply to accept the, for lack of a better word, *dialectical* relationship between the two. As Marshall Sahlins said,

Ironic it is (once more) that anthropologists have been to so much trouble of late denying the existence of cultural boundaries just when so many peoples are being called upon to mark them. Conscious and conspicuous boundary-making has been increasing around the world in inverse relation to anthropological notions of its significance. (1999: 414)

Understanding the political processes of cultural formation is not to deny their explanatory value, but to seek to *explain* it by connecting it to something other than itself. For Sahlins, these are “indexes of more basic structuring codes, modes of order that are themselves largely imperceptible” (1999: 413). But, I would argue, these basic structuring codes are themselves political. Antonio Gramsci does not argue that there is a

directly observable relationship between specific cultural phenomena and specific political positions, rather, he offers us a theory of culture and ideology in which both are seen as emerging out of the political process. We can see this clearly in the Taiwanese case.

I have argued that by looking at the alliances which hold together Taiwan's ruling coalitions we can see Taiwan as entering a critical period during which the alliances which took hold during the Japanese era, between the state bureaucracy, workers and management at large state-owned enterprises, Aborigines, and farmers, are strained to their limits by the shift to an export-oriented economy on the one hand, and the loss of legitimacy suffered by official Chinese nationalism when faced with an increasingly powerful China across the Taiwan Strait on the other.

We can see, starting with the emergence of a unified Hoklo identity at the end of the nineteenth century, the link between the emergence of a strong rural gentry class and an emergent Taiwanese nationalism. This nationalism has not developed consistently, but became stronger whenever the power of the central state over local elites began to wane. It happened under the Japanese when, forced by rice shortages and a wartime economy, they had to make concessions to Taiwanese farmers in the 1930s. It happened again in the 1980s when the shift to an export-oriented economy helped Taiwan's SMEs owned by members of this class. Taiwan's rural gentry have always been petty capitalists (Gates, 1996), but land reforms in the 1950s pushed them out of agriculture and into manufacture. At first land reforms did more to undermine than strengthen this class (see Chapter 4), but

the shift to an export-oriented economy in the sixties eventually gave them new strength and confidence. Combined with a newly strident middle class who rallied around identity-based issues, a strong opposition emerged which was able to challenge the dominant historical bloc. This challenge was, however, effectively neutralized by a compromise, reached in 1990 (see Chapter 2), in which official Chinese nationalism was replaced with a multi-layered nationalism imported from Japan in which cultural identity is seen as radiating out from local communities in a series of concentric circles which grow to encompass all of Taiwan, China, and eventually the rest of the world. While this compromise held steady for nearly a decade, the newly powerful DPP government is now seeking to challenge this model. Central to this challenge is a desire to displace Chinese culture from its status as the circle that encompasses that of Taiwanese identity. However, some Taiwanese fear that this would eventually lead to the emergence of a Hoklo nationalism akin to the official Chinese nationalism of a previous era.

It is in the context of such a struggle that Aborigine identity takes on special significance, far beyond that which would seem to follow from the relatively small size of Taiwan's Aborigine population. Aborigine identity signifies all that is *unique* about Taiwanese identity, and support of Aborigine ethnic aspirations seems to suggest a level of multicultural tolerance that serves to subdue fears of an emergent Hoklo nationalism. These links between Aborigine identity and nationalism are well illustrated by the ways in which Aborigine identity has been used to promote Taiwanese baseball. When the professional baseball leagues in Taiwan were starting to lose ratings due, in part, to the

high percentage of foreign players, a new league was formed in an effort to capture the flagging market. The name of the company which owned the Taiwan Major League (TML, 台灣大聯盟, *Táiwān dà liánméng*), the Naluwan Corporation, as well as “the names of the four teams - Agan (Jin’gang, Robots), Fala (Leigong, Thunder Gods), Gida (Taiyang, Suns) and Luka (Yongshi, Braves)” were taken from Taiwan’s Austronesian languages (Morris, 2004: 196). The official anthem of the TML, “supposedly based on rhythms and patterns of several types of Aboriginal tribal songs, consists of lyrics (see below) in Mandarin, Taiwanese, English, Japanese and Aboriginal languages”:

NALUWAN -- True Heroes
 Take charge - the fervent spirit of the rainbow,
 Our hearts are filled - with great fire shining bright,
 Struggle on - with hopes that never die,
 Start anew - a space for us alone.
 Fight! Fight! Fight, fight! Speed just like the wind,
 K! K! K! Power stronger than all,
 Homu-ran batta - truly strong and brave,
 Aaa ... Na-Lu-Wan, the true heroes! (2004: 199)

This link between Aborigine identity, baseball and Taiwanese nationalism is very strong in the Taiwanese psyche. A little-league baseball game pitting rural Taiwanese Aborigines against a championship Japanese team would become “a defining moment in the history of Taiwanese nationalism” (2004: 183).

[It] began in August 1968, with two great victories by the Maple Leaf (Hongye) Elementary School team over a visiting team from Wakayama, Japan. This Hongye Village team, made up of Bunun Aborigine youth representing their tiny Taidong County school of just 100 students ... became superstars after their victories over Wakayama at the Taibei Municipal Stadium. (Morris, 2004: 182).¹

But despite their symbolic importance to the DPP, and their close political ties to the KMT, Taiwan's Aborigines remain at the bottom of the economic ladder, outnumbered by foreign workers who most Taiwanese prefer to hire over Aborigines for low wage jobs. What little support the DPP had managed to win amongst Aborigines was severely threatened when Vice President Annette Lu 呂秀蓮 (*Lǚ Xiùlián*) called for moving typhoon victims from Taiwan's mountain regions (most of whom are Aborigine) to Central America in order "to give them a new start," a message she later repeated even after criticism (Lin, 2004).

The current situation in Taiwan is very fragile, globalization, as well as political pressure from Beijing continually pushes Taiwan toward greater and greater integration with mainland China, Taiwan's largest trading partner, with an "estimated 1 million *taishang* [台商 (*Táishāng*): workers and businessmen from Taiwan who ... live full-time in mainland China" (Huang and Schuman, 2004). At the same time, Hoklo ethnic nationalism can never fully reveal itself without danger of backlash, forcing nationalist elements to at least give lip service to localism and multiculturalism. It often appears as if the question of Taiwanese independence or eventual re-unification with the mainland underlies cultural policy, but I would like to suggest that the reverse is actually the case. The covertly pro-independence DPP's support draws on precisely those whose SMEs are most involved in doing business with the mainland, while the pro re-unification KMT leadership represents large state owned enterprises allied with local interests

through client-patron relationships established in the Japanese era. Cultural policy serves to mask these realities rather than as a surrogate for them.

Notes

¹ This excitement has not been dulled by the later revelations that nine of the eleven players were ineligible and were playing under false names (Morris, 2004: 183).

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