

Becoming Taiwanese: Negotiating Language, Culture and Identity

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## **Abstract**

Between 1945 and 1987, as part of its efforts to impose a Chinese identity on native-born Taiwanese and to establish and maintain hegemony, Chiang Kai-shek's Kuomintang (KMT) government pursued a unilingual, Mandarin-only policy in education. This thesis studies the changing meaning of "becoming Taiwanese" by examining the school experiences of four generations of Taiyu speakers who went to school during the Mandarin-only era: 1) those who also went to school under the Japanese; 2) those who went to school before 1949 when Taiwan was part of KMT-controlled China; 3) those who went to school during the 1950s at the height of the implementation of KMT rule; and, 4) those who went to school when Mandarin had become the dominant language. Two data types, interviews and public documents, are analyzed using two research methods, focus group interviews as the primary one, and document analysis as the secondary one.

This research found that there is no direct relationship between how people negotiated language, hegemony and Taiwanese identity. First, as KMT hegemony became more secure, people's links to their home language became weaker, so their view of Taiwanese identity as defined by Taiyu changed. Second, as exposure to hegemonic forces deepened over time, people were less able to find cultural spaces that allowed escape from hegemonic influences, and this, along with other life-course factors such as occupation, had an impact on their contestations of language and identity. The study recognizes the role of human agency and highlights the interactive and performative aspects of identity construction. The results reflect the different possibilities of living with hegemony in different eras, and also show that Taiwanese identity is not fixed, nor is there a single, "authentic" Taiwanese identity.

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My supervisor used to say that the process of studying for a PhD is like trying to dig a way from this side of a mountain out to the other. The beginning is hard, because you don't know where to start digging. Your doubt, anxiety, and tension build up as time goes by, as you are not sure if you are in the right track. Not until a dim ray of light is seen in the far distance do you feel a bit relieved. There is still a long way to go, but at least you seem to be able to see the end.

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## Chapter 1 Introduction

A small island like Taiwan presents an ideal place for studying language policy and identity. Because of its ethnic composition, Taiwan had already integrated a rich variety of cultural heritages and linguistic traditions by the 16<sup>th</sup> century, but then successive colonial powers came to the island and further altered its linguistic and cultural landscape. In particular, the aggressive promotion of Japanese and Mandarin from the late 19<sup>th</sup> century to late 20<sup>th</sup> century changed not only people's language use, but their cultural, ethnic, and national identities.

This is a study about identity. It is about becoming. This thesis investigates the meaning of “becoming Taiwanese” by examining the role of language and language-in-education policy in shaping the school experiences of four generations of native speakers of Taiyu, also known as Taiwanese, which is the native language of the majority of people living in Taiwan. It uses a document analysis approach to present the official policy, and adapts an oral history approach to the use of focus group interviews to document people's lived experiences. As such, it is a study about language and identity, and does not adopt cognitive and developmental perspectives of how language learning is linked to personal identity development, but instead examines the social, historical, and cultural aspects of how the formation and hegemonic effect of a language policy, specifically the Mandarin-only policy that operated from 1945 to 1987, has informed the formation of collective Taiwanese identities. To be more precise, the complex relationship between language as part of the hegemonizing process and people's contestation of language and national identity/nationalism is the focus of this study, as seen through people's memories of

their own school experiences.

However, a study of collective Taiwanese identity with regard to its social, cultural, and national aspects does not mean that identity formation in the sense of personal development is excluded from the discussion. In fact, in the formation of a cultural or national identity, the parts of identity that are informed by a person's family upbringing, gender, or social class cannot be ignored. In this study, I recognize the impact of personal identity development wherever appropriate, but still retain cultural/national identity and how these have been impacted by both hegemony and language policy, as the focus of this thesis.

### **The Origin and Focus of This Study**

When I was working on the proposal for the present research, I came across a blog called "Becoming Taiwanese" hosted by a second generation Taiwanese American who had relocated in Taiwan and wanted to "become Taiwanese again." Several other people in similar situations posted on this blog, also expressing their aspiration of "becoming Taiwanese again", implying that there is a process to achieve this. Many of these authors had been moving between Taiwanese and American identities all their lives. By "becoming Taiwanese again," as "Pingtunggirl" (a screen name for one of the writers) said, "it's like the needle on the dial is swinging back to the Taiwanese side" (Pingtunggirl, 2009). It is notable that none of the authors talked about how their Taiwanese-ness and American-ness fit together, and I suspected that the division between their identities was not clear-cut, but a blurred area composed of back-and-forth crossings, adaptations, negotiations, and even tensions.

Two questions were of interest to me in this case. Firstly, how did these authors see

their Taiwanese-ness? Did they see it as something perpetual, something that ran in their blood as well as in their parents' and grandparents' blood or did they see that their Taiwanese-ness had changed and was different from that of their parents' and grandparents'? Secondly, how can these Americans become Taiwanese again? How can an abstract concept like "Taiwanese-ness" be lived and "performed" as Ibrahim (2004) calls it? Because of this view of seeing cultural identity as pre-existing, fixed, distinctive, and given by one's culture, some of the writers, such as "Pingtunggirl," seemed to think that their Taiwanese-ness was not geographically constrained, and that it could be resumed by getting back in touch with the culture and learning to speak the language, whether Mandarin or Taiyu (Pingtunggirl, 2009). Therefore, I return to my question—is Taiwanese-ness related to a common origin, shared culture and shared languages, or does it have to be earned and learned. Since there is no such thing as an "authentic identity" in one's blood, is Taiwanese identity socially constructed?

Many studies have, empirically and theoretically, supported the constructivist perspective of seeing identity formation as the product of social construction and as a matter of becoming as well as being (see for example, Butler, 1990/ 2006, 1993; Calhoun, 1994; Campbell, 2000; Gilroy, 1987; Hall, 1990, 1996; Ibrahim, 2004, 2008; James, 1995; Wittiq, 2003). Homi Bhabha, for example, used the term, "culture's in-between", to describe the migrant experiences of tension and conflict created by living between two cultures, a process that plays an essential role in their identity formation (1996, 2006). In the case of the "Becoming Taiwanese" bloggers, what really interests me is not so much how those living in "culture's in-between" resume their Taiwanese identity as the meaning of "becoming Taiwanese" as a process of social construction. "Becoming" indicates that identity is an

ongoing work, and thus it is a product of history that never arrives at an end point, since the process of identity formation never ends (Hall, 1990; Ibrahim, 2004). Put in Stuart Hall's words, it is the upheavals and ruptures in history that bring a cultural group to a collective identity that is distinct from that of others with whom they share the same origin (Hall, 1990). In view of this, second generation Taiwanese Americans will have a different cultural identity from their sojourner parents who will also have different identities from their compatriots living in Taiwan who have gone through different histories. Identities are shaped by the distinct geographical and chronological contexts people have experienced. On the other hand, this also implies that people who lived the same history in Taiwan should share a more consistent collective identity as compared to people who went through a different history. In other words, collective identity will have some generational differences, especially when there are significant historical upheavals and ruptures occur. My research findings confirm this, but they also show that personal development plays an important part in this process. As will be shown by the literature review and verified by people's own accounts later, besides being socially and historically constructed and constrained, people's agency, which articulates their personal identity development, also plays a key part in shaping identity.

Such a perspective that sees identity as the work of history brings to light one of the significant perspectives of identity as a matter of becoming; that is, an understanding of identity is not possible unless it is done in the context of the history where it is shaped. In the course of history, identity work has come to have so many facets that today, as Rey Chow argues, any effort to define it in a single dimension will fail to capture its diversity, and more importantly, will fall into essentialism (Chow, 2000). Pointing out the danger of an

essentialized perspective of understanding ethnicity, Chow claims that ethnicity needs to be problematized and Chineseness needs to be theorized rather than just empiricized. She argues that without studying Chineseness at a theoretical level, Chineseness, whether it is defined by race, language, or literary genre, is in fact meaningless (Chow, 2000), and theorizing Chineseness has to be done by tracing the historical trajectories where it has been nurtured.

There is another reason why ethnic or racial identities need to be theoretically defined. Shaped in the cultural, political, and historical contexts which cannot be free from the work of power, some identities are yielded dominant while others are not. To theoretically define a dominant identity, such as Whiteness or Canadianess, brings into focus what is otherwise invisible. This “bringing to light” is significant not only for dominant groups, but also for minorities who have been impacted greatly by dominant identities. Studying the historical trajectory of the formation of the dominant identity can reveal how dominance is created and enacted. To theoretically define a minority identity, on the other hand, reveals how the interaction between the dominant identities and minority ones bring the latter into being, which explains why Chow insists on theorizing Chineseness in the context of Whiteness. In a similar vein, without theoretically studying the different historical contexts of Taiwanese identity formation and the mechanisms of becoming Taiwanese in relation to the dominant “Chineseness,” which is an essential and indispensable part in Taiwanese people’s “Taiwaneseness,” the term “Taiwaneseness” becomes meaningless. As I will argue, not only does the entering of Chineseness hybridize Taiwaneseness and decide how it is represented, but the mechanisms of the “entering” alters the content of Taiwanese identity.

By recognizing the influence of Chineseness in Taiwanese identity, I am referring to the second significant perspective of identity formation; that is, while history nurtures identity, it is often power that fixes how an identity is represented. To theoretically define a minority identity means to expose the work of power in fixing an identity. Chow (2000) aptly argues that the taken-for-granted labels of “Chinese” and “Chineseness” on a theoretical front are problematic, and that a deconstruction and reconceptualization are called for to expose the work of power. These labels are problematic because lying behind these representations is the question of who gets to decide what Chineseness means or should mean. Take for instance the binding of standard spoken Chinese, Mandarin, with Chineseness, which Chow (2000) refers to as a residue of the problematic ethnic supplement. Chow argues that the assumption that binds Chinese studies to Mandarin not only suppresses the plurality of other Chinese languages under “standard Chinese” and ignores the hegemony of Mandarin, but it also reflects the legacy of postcolonialism and white supremacy, as this “standard Chinese” is actually “white men’s Chinese” (p. 8).

Chow’s argument points to the essential role that power plays in the representation of an identity, not just “what an identity is seen as,” but “by whom it is seen as such.” My analysis of the “one-China” discourse in Canadian English newspapers provides another example of how power fixes identity representations in the case of Taiwan as a part of China (Y. Chen, 2009). In that research, I documented and analyzed how Canadian English newspaper articles referencing Taiwan, as well as people and things Taiwanese, were positioned with regard to China. The aim was to learn how Canadian newspapers inform their readers of representations of Taiwan as part of China. In the cultural space created by Canadian newspapers, which Canadian people often rely on to know about Taiwan, readers

imagine what Taiwan is and is not. A discourse is thus constructed that encourages people to imagine Taiwan and China as a community, despite the fact that voices from within Taiwan itself articulate different, more controversial, Taiwanese identities (Y. Chen, 2009). In addition to Foucault's conceptualization of discourse and the work of power in composing it (Foucault, 1980b), this analysis also recognizes the importance of accommodating people's voices in understanding an identity, in particular a minority identity, such as Taiwanese in contrast to the dominant Chinese one. The present research uses oral history/focus group interviews as the primary approach to understand Taiwanese identity.

Billig (1995) calls the construction of national identity, as well as the making of a national language, "a battle for hegemony" (p. 21), which is seeded with resistance and struggle. Resistance and struggle means that there could not be a single voice, but that the people who are heard are those with power or who are privileged by those with power and thus can speak, as Spivak notes when she refers to women as the subaltern who cannot speak (Spivak, 1994). What happens to those whose voices are silenced due to lack of power? Those who are subordinated in reality can contribute different voices, and thus different sides of the story, according to Spivak (as cited in Ashcroft, Griffiths, & Tiffin, 2007; Harasym, 1990) and Said (1979). Without such voices, what we hear is always only one side of the story, and thus it is not possible to know who gets to decide how an identity is fixed. Take the present research for example. It examines a story, told by the subordinate Taiwanese, about how, under hegemonic forces, they became what they are today in a historical process.

The connection between language and cultural identity provides another instance of the role of power in shaping identity. Although nationalism is almost always defined by a

specific language, the reverse is not necessarily true. In the United States and Britain, the dominant language is English. But just because someone speaks English does not mean that they necessarily identify with being an American or British. There are people, such as Canadians, who speak English and have different national identifications. In the context of what Alastair Pennycook (2007) calls “global Englishes,” English can no longer be seen as a single nationalistic representation of the U.S. or Britain. That being the case, language has always been used by nationalists as a tool to appeal to the populace’s sense of national identity (Billig, 1995), and it is power that fixes the nationalized representation of language and links it to nationalism.

Taiwan during the Mandarin-only era offers an example showing how power fixes ethnic/ national identity through language. Before the arrival of the nationalists from Mainland China in 1945, people in Taiwan spoke many different native languages, including Taiyu, Hakka, and aboriginal languages, but not Mandarin. To legitimate its governance and the idea that Chinese was the nationality of the people in Taiwan, the nationalist government ensured that Mandarin was the only language that represented the nation. As shown in the stories told by the research interviewees, especially those who experienced the mid- to late Mandarin-only policy era (1959-1986), most young people were educated to see themselves as Chinese and spoke only Mandarin, two things they took as natural and unproblematic. This experience shows how power interfered with, shaped, and fixed the meaning of “becoming Taiwanese” at this time.

Two aspects of identity inspired the present research. The first is the complexity of the concept of “identity” itself for people living in Taiwan. To use a term from Bhabha (1996,



2006), their living in “culture’s in-between” has made the issue of identity a complex one. Over their history, people in Taiwan have acquired or had been forced to acquire several different identities—Japanese, Chinese, and Taiwanese. However, as Linda Colley asserts, “identities are not like hats” (as cited in Ramsay Cook, 2000, p. 265), people can and do put several on at a time. Apart from the three main identities of Japanese, Chinese and Taiwanese, there have been people in Taiwan who self-identified as both Japanese and Taiwanese, or both Chinese and Taiwanese. I grew up under Kuomintang (KMT) rule during the martial law era. In my youth, like many other Taiwanese, I was taught to “become Chinese” via the school curriculum and the Mandarin-only education policy. After we grew into adults, we started to resume a Taiwanese identity. In the last few decades, after the lifting of martial law in 1987, society has seen a gradual change from being Chinese to being Taiwanese, via democratization and educational reforms. By 2000, “being Chinese” was an identity many Taiwanese people wanted to secede from (S. Huang, 2000; Tse, 2000). While this may still be so, closer economic ties to Mainland China in recent years have changed the cross-strait relationship. To go further back in history, ever since the Japanese left in 1945 and ended the process of “becoming Japanese,” people in Taiwan have been moving between the two ends of the identity spectrum, “becoming Chinese” and “becoming Taiwanese.” Identification has never been an easy task for people living in Taiwan. The issue of whether Taiwan is Chinese in outsiders’ eyes, the wrestling between “being Taiwanese” and “being Chinese”, and the jangling discord within the island over linguistic, ethnic, and national identities, which arose especially during the major elections of recent decades, all call for a historical, and not just theoretical, understanding of how people became Taiwanese, against the background of how they also became Chinese.

In addition to a call for historically understanding “becoming Taiwanese,” several points are noteworthy here. First of all, any identity tag, be it Japanese, Taiwanese, or Chinese, is never a pure thing, but is instead a blend, a hybrid, whose existence challenges the essentialized perspective of seeing an identity. That is, there is no clear-cut line where one identity ends and another begins, as people actually live between and across identities. The construction of identity is also a process full of tension and conflict, as Bhabha sees in those migrants who live between and among cultures (Bhabha, 1996, 2006). For Taiwanese people in the Japanese Kōminka era (1937-1945), their struggle over identity, as Ching (2001) argues, was a fundamental issue which arose not only from living “between cultural assimilation and political discrimination” but also from becoming “an incomplete imperial subject” (p. 91). Secondly, these identity transitions did not arise from nowhere, and clearly reveal part of the complexity of Taiwanese identities given by history, demonstrating the concept of cultural identity as a matter of becoming fixed by power. The identity-shaping process is thus an ongoing one, as history continues. Accordingly, “Taiwaneseness” is never a static constituent, but is always in the making. It is therefore doubtful whether there is an authentic Taiwanese identity, which is easily distinguishable and definable. In fact, as will be confirmed in the research findings, Taiwanese people who lived through a shared history constructed a collective Taiwanese identity that displayed generational differences. In their ongoing, historically-constrained identity work, people, including the interviewees in this study, also exert human agency, articulating personal differences within a shared collective identity.

A second inspiration for the present research is the role language has played in relation to the Taiwanese people’s national identity. Theoretically, language is perceived to be

pertinent in identity formation, in particular national identity, due to the sense of solidarity it provides for its speakers (Bucholtz and K. Hall, 2004). Language, “as a fundamental resource for cultural production, is hence also a fundamental resource for identity production” (*ibid.*, p. 382). We make sense of the world, concrete or abstract, through language, via a representation system language creates (Hall, 1997a). This “representation system language creates” is, in Gramsci’s term, a “world-view,” through which speakers of a language interpret the world. Gramsci (1971) elaborates on the role of language at the nationalistic level in the exercise of power, arguing that, by imposing a language on a subordinate group, the dominant ruling class actually transplant their own world view to the subordinates, which is a step to establish hegemony (as cited in Ives, 2004). Following Gramsci, Billig (1995) contends that, due to the intimate bond between language and nationalism, language has always been utilized by nationalists as a prime determinant of nationalist identity, although in reality it is a historical construct of nationalism. On the practical front, in a multi-ethnic society like Taiwan, language has a close link to shaping people’s ethnic identity. But for people living in Taiwan, language has not only been linked to identity ethnically, but also nationally. Beginning with the arrival of the KMT in 1945, the Taiwanese people were under a monolingual policy for more than 40 years, whose purpose was mainly nationalistic, and even when it was abolished in 1987 its legacy still played a role in the debate around Taiwanese-ness vs. Chinese-ness, as well as Taiwanese nationalism vs. Chinese nationalism. As noted by Scott and Tiun (2007) and Simpson (2007), debates about language in Taiwan are clearly political and are linked to ethnicity and national identification, which has much to do with the enactment of the Mandarin-only policy.

For those living during the transition between Japanese and KMT rule, people were required to drop their familiar language and adopt a completely new one. How they took to this sudden change became part of their identity formation. In contrast, for those who started school in the 1950s-1970s, the KMT's Mandarin-only, or so-called National Language Movement (NLM), was their shared memory. Being fined or receiving corporal punishment for using a language other than Mandarin at school and being humiliated for doing so, were experiences that they never forgot. I attended elementary school in the 1970s, and do not remember ever hearing my home language, Taiyu, at school. I remember myself and my friends taking pride in being able to speak "standard Mandarin" without a Taiwanese accent, and in not being able to speak Taiyu fluently, because that meant I not only could speak Mandarin, but I spoke it well. People who spoke Mandarin with a Taiwanese accent were often teased. P. Chen (2000) notes this shared ideology of Taiwanese school children during this period, which clearly linked speaking good Mandarin to a self-identification of being Chinese and superior. She writes, "When we speak Mandarin without a Taiwanese accent, we Taiwanese children also identify ourselves with Mainland China. China is the most beautiful land, while Taiwan is but a way station until we return to China" (p. 131).

In our young minds, speaking good Mandarin was something to be proud of, while Taiwanese was taboo in the public sphere because its alleged backwardness only brought humiliation. Native languages thus became "home languages," which were only spoken at home. A statement from the first elected Taiwanese president, Lee Teng-hui, made when he was over 70 years old, gives a vivid account of the situation, "...having lived under different regimes, from Japanese colonialism to Taiwan's recovery, I have greatly experienced the

miserable of the Taiwanese people.” Lee noted that under Japanese rule, Taiwanese would be punished by being forced to kneel out in the sun for speaking Taiyu. He felt that the same was true under the KMT:

My son, Hsien-wen, and my daughter-in-law, Yueh-yun, often wore a dunce board around their necks in the school as punishment for speaking Taiyü. I am very aware of the situation because I often go to the countryside to talk to people. Their lives are influenced by history. I think the most miserable people are Taiwanese, who have always tried in vain to get their heads above the water. This was the Taiwanese situation during the period of Japanese colonialism; it was not any different after Taiwan’s recovery. I have deep feeling about this. (as quoted in Hsiao 1997, p. 302)

This account, along with many Taiwanese people’s memories of the NLM, clearly reflects not only how the KMT regime acquired authority by establishing cultural hegemony, but also people’s struggle in their identity formation. People were not just forced to use a language, but in that era all official documents, textbooks, newspapers, and TV programs instilled in Taiwanese people the idea that they were “Chinese,” who had on their shoulders the responsibility of returning to the Mainland to relieve the suffering of their fellow countrymen. Taiwan was thus only a temporary station, and home was there across the strait, a place that most people in Taiwan were not familiar with. People were told that as Chinese they should be proud of speaking Mandarin, or “Gouyu,” meaning “national language,” as this was the only language that led to national solidarity, and thus the only legitimate language that all Chinese should speak. Home languages, such as Taiyu, Hakka, and aboriginal languages, were thus seen as backward, and speaking them would only hinder the unification of all Chinese people. In a righteous cause, they thus believed that such languages should be

discarded.

These ideologies influenced Taiwanese children and adults living during the Mandarin-only policy era, as seen in the fact that for a long time my peers and I regarded ourselves as Chinese, taking pride in speaking standard Mandarin, and considering speaking home languages and Taiwanese Mandarin a shame. The case of Taiwan reveals that language and language policy greatly shape people's identity. A considerable body of research has confirmed this (see for example, S. Huang, 2000; Makeham, J. & Hsiau, A., 2005; Sandel, 2003; Scott & Tiun, 2007). But how in reality did Taiwanese people live the Mandarin-only policy and KMT's hegemony, and at the same time contest their identity? In exploring the relationship between hegemony, language and Taiwanese-ness, my focus is on how the KMT's hegemonic power fixed Taiwanese identity by neutralizing and normalizing a problematic language-in-education policy during their school years. With such a focus, this research navigates between language and identity to search for the meaning of becoming Taiwanese for Taiwanese people, with the main concern to show how people growing up at different stages of hegemonic construction lived the language policy and contested the meaning of Taiwanese-ness, including the use of their home languages. The focus is on the period between 1945, when Taiwan came under the rule of KMT, and 1987, when martial law was lifted.

Chapter 2, the literature review, starts with a brief outline of Taiwanese history/ ethnic composition and a review of the important literature on the history of language and language policy in Taiwan. The important literature on the three major themes of this thesis, identity, language, and hegemony, is then organized around the key theorists, including Stuart Hall,

Michel Foucault, Michael Billig, Antonio Gramsci, and others, whose works provide the conceptual framework of the thesis.

Chapter 3, the methodology, describes the research design and rationale that support the methodology used in this work. This study adopts two main sources of data, public documents and interviews. The former serves as secondary background materials that support the primary data drawn from the interviews. It uses newspapers and professional journals to construct a picture of the KMT's nationalistic discourse and the official Mandarin-only policy that informed Mandarinization and the process of becoming Chinese. Anderson (2006) argues that nation-states are "imagined communities," while Billig (1995) calls languages "imagined products of the imagined community" (p. 31). Imagined as they have always been, nation-states and languages are represented as if they existed from time immemorial, and the links between them are seen in the same way. The pursuit of national solidarity through the standardization of language has thus been a major task in the history of many modern nations. This is what Friedman (2005) means by contending that language policies and their ideologies are tools for realizing the establishment of nation-states. Like many nationalistic movements, the Mandarin-only policy also used the taken-for-granted, "natural" link between language and nationalism to work nationalism into people's everyday lives, as nations, once they have come into being, need to be supported to achieve sustainability and the "natural" link between language and nationhood can help in this process. In this regard, the media has a key role to play in the sustainability of this nationalistic mission. People need to be reminded of the existence of their nationhood at all times, so that national identity is not forgotten. As such, not only are national symbols present everywhere in people's daily lives, but also there are other symbols, such as a deixis

of little words and nationalistic phrases in the media, to ensure the development of a nationalist identity. According to Billig, the media and its banal nationalistic markers, the deixis, are the tools which support the sustainability of the nation state. In the Mandarin-only policy era, these two things also sustained the KMT's legitimacy and the Mainlanders' dominance.

As mentioned above, both language and nation state are imagined and created in a way that makes them seem to exist in the world naturally and unproblematically. However, in reality, in everyday life, how do people live the link between the two imagined products and the hegemonic forces that created the link? Does language directly produce national identity? Does hegemony work on coercion or the subordinates' consent? To answer questions like these, this research adopts focus group interviews to revisit people's elementary school experiences to know how, in their memories, they lived the Mandarin-only policy, the differences between Waisheng [the Chinese mainlanders] and Bensheng [the native Taiwanese] in society, as well as their impressions of the strongly enforced cult of Chinese nationalism, all of which are ultimately linked to their becoming Taiwanese. In this respect, the research participants can tell their own stories and thus help us conceptualize "becoming Taiwanese." Since this study recognizes the importance of accommodating participants' voices in answering these questions, a variant of oral history is adopted as part of its methodology. In addition, the choice of focus group interviews to obtain oral histories is also based on the consideration that in the era of the monolingual policy and martial law, with rigid restrictions on publication and speech, there are few primary documents available on politically-laden topics, such as the link between home languages and ethnic/national identification. All that we have are mostly biased official



histories with numerous blind spots, and, as Ritchie notes, “as a result of such blind spots, oral history can develop information that might not have appeared in print” (2003, p. 26).

With a focus on the impact of hegemonic construction and language policy on people’s identity formation, Chapters 4 to 7 are devoted to empirically studying people’s elementary school experiences in four successive eras between 1945 and 1987: before KMT rule/ under Japanese rule, the early KMT years, the era when KMT hegemony was being established, and the era after it was fully established. More precisely, these chapters study how, in their school years, people lived through the process of Mandarin becoming the dominant language in Taiwan, and the rise of social differences between Bensheng and Waisheng. They also explore how these experiences shaped people’s views of the meaning of Taiyu and a Taiwanese identity over time.

Drawing on the research findings, Chapter 8 discusses the key concept of “becoming Taiwanese” against the backdrop of how people negotiated the shaping and reshaping of national community boundaries, aggressively constructed Mandarin and Waisheng dominance, and the meaning of home languages. In the concluding part, Chapter 9, I discuss the implications of the empirical findings drawn from a Taiwanese context with regard to theorizing a relationship between language, hegemony and identity. The potential limitations of this study and implications for future research are also highlighted for future work.

### **Research Questions**

Simply put, the present thesis studies the meaning of “becoming Taiwanese,” articulated in how people remember living through the transition between nationalities, the

Mandarin-only policy, as well the establishment of the KMT hegemony. It tries to empirically add to our theoretical understanding of the conceptualization of “becoming Taiwanese.” This language-in-education policy is significant, not only in that it changed the language use of people in Taiwan, but also because it influenced their perception of home languages and Taiwaneseeness based on the promotion of Mandarin use and the adoption of a Chinese identity. In being taught to become Chinese as part of the nationalistic project, Chineseness was claimed and believed to represent the whole nation, which explains why Taiwanese people had to learn Mandarin and other aspects of Chinese culture to become Chinese. In this process, Taiwanese people not only saw “us” as part of a nation with “them,” but also “us” as an inferior part compared to “them,” which was a mechanism for the construction of hegemony. Not only were “the homeland” and “the boundary” flagged, but so were the differences between local Taiwanese people (Bensheng Ren) and Chinese from the Mainland (Waisheng Ren), Taiyu and Mandarin, Taiwanese culture and Chinese culture. In becoming Chinese under the KMT’s hegemonic project, people not only recognized Chineseness and Mandarin as superior, but did so by acquiring a sense of inferiority about their home languages and Taiwaneseeness. What we see during the long span of the policy is not just a language shift from Taiyu to Mandarin, but also a changing relationship between Bensheng Ren and Waisheng Ren, as reflected in the concepts of “differences,” “dominance,” and “hegemony,” and ultimately the shifting meaning of becoming Taiwanese.

Using the period of the monolingual policy as the time frame for this study, this thesis asks the following questions: What was life, particularly school life, like during the era of martial law and the Mandarin-only policy? How has the meaning of home languages and Taiwaneseeness changed for Taiwanese people? By having people revisit their memories of

life as students and teachers, this thesis explores the impact of several things on their identity construction, including schooling (under Japanese and KMT rule), language (Mandarin and Taiyu) and hegemonic construction (martial law, the Mandarin-only policy, the 228 Incident,<sup>1</sup> the Bensheng-Waisheng relationship).

To be more specific, this thesis examines the following central question: What does the Taiwanese experience show about how language produces identity?

This is then further divided into the following three questions:

1. Between the 1930s and 1980s, how did people negotiate language, hegemony and identity in becoming Taiwanese?
2. What was the role of Taiyu in the production of Taiwanese identities, and how did this change over time?
3. How did the hegemony of the Japanese and later of the Kuomintang (KMT) shape people's negotiations of language and identity?

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<sup>1</sup> The 228 Incident happened in 1947 and was an outlet for the accumulated bitterness of Bensheng Ren toward the KMT government and Waisheng Ren since they came in 1945. The discussion is found in chapter 5.

<sup>2</sup> Like those who entered Taiwan in the 17<sup>th</sup> century, the Chinese migrating to SE Asia mainly came from the maritime provinces of the Mainland, esp. Guangdong and Fujian province. The emigration from China reached its height in the 19<sup>th</sup> and early 20<sup>th</sup> centuries.

<sup>3</sup> The 228 incident of 1947, an anti-mainlander uprising of local Taiwanese people, was violently suppressed by the KMT government, leading to thousands of deaths (Edmonson, 2002; Simpson, 2007). The

## **Chapter 2 Review of the Literature**

Before turning to the literature and methodology that provide the conceptual framework of this study, I will present an account of Taiwan's colonial history, its ethnolinguistic composition, and language policies, in particular the Mandarin-only policy.

The literature review is composed of two parts. The first part focuses on the studies of history of language and language policy in Taiwan, including M. H. Wu (2011) on language policy and planning, Friedman (2005) on language ideologies and the evolution of Taiwanese linguistic nationalism, Sandel (2003) on how language policy and ideologies affect real language practices, and P. Chen (2000) on how Taiwanese people became Chinese due to the impact of Chinese nationalism during Chiang Kai-shek's regime. The purpose of the review is to show the context of my thesis and where the present work stands in relation to these earlier works. The second part reviews the key theorists and related concepts, which then serve as the theoretical basis of the research and guide its conceptual framework.

### **Colonial Taiwan and Language Policies**

In this section, I introduce Taiwan's four major ethnic groups, along with their languages, as these have contributed to the ethnolinguistic map of the island. This is followed by a brief history of Taiwan, dating back from Taiwan's earliest connection with China to the colonial rule of Japan and the KMT era, with a focus on colonial language-in-education policies.

Taiwan is a small island, 394 km and 144 km at its longest and widest, with a population of 23 million ("About Taiwan," 2010). This small island integrates many cultural heritages as well as many linguistic traditions. In its history, there has never been

any single language that has dominated across all of Taiwan's geographic regions, and the island's linguistic diversity is due to the four groups who make up the island's inhabitants, three of which are Han Chinese.

The Austro-Polynesian aborigines have been on the island for several thousand years. Comprised of ten tribes, each with different languages and dwelling in different regions of Taiwan (S. Huang, 1993), they make up 2% of Taiwan's current population (Kaplan & Baldauf Jr., 2003; "Taiwan," 2012). The Taiwanese, or Hoklo people, who started arriving in Taiwan in large numbers in the 17th century after the Manchu invasion of the Mainland, account for 72% of the population. Taiyu, also known as Holo or Taiwanese, is the mother tongue of this population ("Taiwan," 2012). The second Han group that came to the island was the Hakka, who were minority Han immigrants in the 17<sup>th</sup> century, and account for 12% of the current population ("Hakka culture and history," 2007), with Hakka being their mother tongue. The Chinese mainlanders, who arrived around 1949 when the Republic of China (ROC) government relocated to the island, make up 14% of the population in 2012. They brought Mandarin to the island, which later was imposed as the official language ("national language" or "guoyu") of the ROC. After 1949, the Han Taiwanese and the Chinese mainlanders came to be differentiated as "Bensheng Ren" (those from within the province; the Hoklo) and "Waisheng Ren" (those from out of the province; the Chinese mainlanders). Even second generation Chinese mainlanders who were born in Taiwan are still referred to as "Waisheng Ren."

The languages and cultures of these different groups made Taiwan a multicultural and multilingual country well before the 20th century. Taiwan was ruled by Dutch settlers in

the 16th and early 17th century for a short period until Chinese rebel naval forces defeated the Dutch and large numbers of Han people began to arrive from coastal China, in particular from Fujian province. Taiwan's connection with the Chinese government dated back to the 17th century, the Qing period, when an influx of Han Chinese, including Hakka and Hoklo immigrants from the maritime provinces of the Mainland settled in Taiwan with the rebel forces. The Hoklo mostly came from southern Fujian Province, while the Hakka migrated from eastern Guangdong Province ("About Taiwan," 2010). About this time Chinese immigrants started their emigration to part of south-east Asia<sup>2</sup> (G. Wang, 2000).

Not until the late 17th century did the idea of Taiwan as part of China take hold among the Han, when the Qing dynasty brought Taiwan into its imperial realm after defeating a rebel force that was based on the island. Indeed, Taiwan did not appear on any imperial map until 1683. Even after this, Taiwan was only very loosely linked to the central government, due to the Qing's sentiment that Taiwan was "a peripheral little mud ball, insufficient to significantly expand Chinese territory" (as cited in Davison, 2003, p. 23). The Qing thus had no real interest in cultivating Taiwan and even thought about moving all Chinese settlers back to the mainland and abandoning the island (Brown, 2004). Though the Qing ultimately did not relinquish Taiwan, their passive attitude toward ruling the island meant that it was only a prefecture, weakly tied to the mainland system (Ma & Cartier, 2003).

The Qing authorities strictly limited immigration to Taiwan. By 1682, there were only

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<sup>2</sup> Like those who entered Taiwan in the 17<sup>th</sup> century, the Chinese migrating to SE Asia mainly came from the maritime provinces of the Mainland, esp. Guangdong and Fujian province. The emigration from China reached its height in the 19<sup>th</sup> and early 20<sup>th</sup> centuries.

about 7,000 Han Chinese in Taiwan. After 1760, this policy became more loosely enforced, with the Han Chinese population rising to 2 million by 1811, most of whom came from Fujian. Together with the aborigines and the Hakka, the population of Taiwan was an ethnically and linguistically diverse one of approximately 2.5 million at the time of the Japanese takeover in 1895 (Tang, n.d.).

The Han Chinese immigrants were a divided group due to their strong awareness of geographic origin. Continual conflicts thus arose among the Han from different provinces, those from different divisions of a province, and between Han and Hakka settlers.

Meanwhile foreign incursions plagued China, from the British in the Opium War in 1840, followed by the French in the Sino-French War in 1884. These invasions led the Qing authorities to strengthen coastal defenses by proclaiming Taiwan as a separate province with its own governor in 1885. Liu Ming-chuan, the first governor, divided Taiwan into three prefectures and eleven counties, built roads across the island and a railway in northern Taiwan, while at the same time making greater contact with the aborigines and building schools for aboriginal children (F. Huang, 2003).

From the late 1600s until 1895, when Taiwan was ceded to Japan, Holo, or Taiyu, was the most widely spoken language in Taiwan, with classical Chinese being the written form taught in traditional private schools (Scott & Tiun, 2007).

### **Japanese Period 1895-1945: Becoming Japanese**

After the First Sino-Japanese War, the Qing Empire ceded Taiwan to Japan in 1895, with the island become Japan's first colony. This acquisition "became an exercise beyond

purely economic calculations” and was taken by Japan as a proof of its capability of “undertaking the ‘great and glorious work’ of colonialism” as Western imperialists (as cited in Ching, 2001, p. 17). It was with this mindset that Japan devoted much effort to improving the island’s economy, industry, public works and above all, its culture. The aim was to turn Taiwanese people into “subjects of the Emperor.”

Recognizing public education as one of the most effective mechanisms to establish hegemony, the Japanese government put great efforts into developing the compulsory primary education system. This system, although segregated by ethnicity, with locals channeled into vocational education to help increase productivity and higher education reserved for Japanese citizens (Tsurumi, 1977), had an immense impact on the local population. One study shows that by 1944 Taiwan had the second highest primary school enrollment rates in Asia, second only to Japan itself (“Taiwan jianshi,” 2004).

The language-in-education policy was a key feature of Japanese colonial education and was also recognized as an important mechanism in assimilating Taiwanese people into the empire. Under the “Kōminka Movement,” the National Language [Japanese] Movement was the first language-in-education policy of its kind in Taiwan’s colonial history.

Although the Japanese government started promoting Japanese after the occupation of Taiwan, the policy did not become fully implemented until the later stages of its rule. At first, strategically, classical Chinese was kept alongside Japanese to appeal to the Taiwanese people (Fewings, 2004). With the outbreak of the Sino-Japanese war in 1937, the Japanese colonial government began to take drastic measures to increase the use of Japanese on the island (Fewings, 2004; Scott & Tiun, 2007). Chinese classes taught in public schools were



removed from the curriculum (S. L. Wang, 1999), and not only was classical Chinese banned in newspapers, but local Taiwanese languages were also suppressed. Considerable efforts were made to eradicate the Chinese cultural roots of the Taiwanese people (Z. Z. Lin, 2006), and the increasingly relentless Japanese-only monolingual language policy enforced through public systems of education and media aimed to build a Japanese identity in the local populace (Ching, 2001).

The harsh colonial education and language policies aroused resistance from among the local population, as seen in the rising number of people privately studying Chinese (S. L. Wang, 1999), as well as the low percentage of Taiwanese people who actually spoke Japanese, which was just 2.9% in 1920, and 37.8% in 1937 (Fewings, 2004). These figures rose due to the strict language education policy, and reached up to 71% in 1944, according to S. Huang (1995) and Mendel (1970). Ironically, however, local Taiwanese elites who spoke fluent Japanese and benefited from the modern education system were “among the first to advocate equity for Taiwan” (Fewings, 2004, p. 138), thus implying that their compliance with the colonial government was superficial. Using colloquial Chinese, the intellectuals articulated their resistance to the colonial government’s inequitable treatment of Taiwanese people in a literary movement that thrived in the 1920s and 1930s. This movement is thus seen by Kawahara as “part of the development of Taiwan’s social-political movement against the colonial government” (as cited in Fewings, 2004, p. 151). Therefore, although at the top of the educational pyramid, the policy of Japanese assimilation appeared to have been successful, but, in reality, it did little to prevent the resistance of Taiwanese elites towards their Japanese rulers. As will be seen in Chapter 4, these Japanese policies did not suppress Taiwanese nationalism, but instead fostered it (Meisner, 1963).

The Japanese language-in-education policy thus gave the Taiwanese a common language, Japanese, which enabled communication and fostered a collective, resistant Taiwanese identity (Scott & Tiun, 2007). Prior to that, what connected Taiwanese people was more of a common cultural origin, a blood lineage rather than a national consciousness. The nationalism that evolved from a vague sense of Taiwaneseeness during Japanese rule was shaped by several factors, as explained in more detail below.

First, Japanese colonial rule made the Hakka and Hoklo people who were divided by linguistic and other differences in the past see themselves with their common interests (Ma & Cartier, 2003). As Brown (2004) contends, “With the imminent arrival of Japanese troops came the first indications of a pan-Taiwanese identity, an identity limited to Han” (p. 8). Before that, Brown notes, “feuding [xiedou] based on ethnicity, lineage, and place or origin erupted frequently in Taiwan” (*ibid.*). Second, as Gellner notes, nationalism is the product of a national education and communications system (Gellner, 1983), and the Japanese educational system enabled communication among Taiwanese people and thus facilitated the development of a national identity. Third, rule by a foreign regime aroused awareness of cultural differences, as well as the issues of domination, and social inequality. Therefore, instead of adopting a Japanese identity, the local populace, being isolated from Mainland China and dominated by an alien power, began to cultivate a sense of common identity that connected them to each other and to Taiwan (Simpson, 2007). This common identity led to the emergence of Taiwanese nationalism, which was later strengthened under the harsh rule of KMT. It was thus Taiwanese nationalism, rather than Japanese, that was taking shape during the era of Japanese rule.

## **KMT Rule 1945-1987: Becoming Chinese**

While Taiwan was under Japanese rule, vast changes occurred in Mainland China. The 1911 revolution overthrew the Qing dynasty and founded the Republic of China (ROC). Sun Yat-sen helped to establish Chinese nationalism, and was able to do so because he united the Han people against the minority Manchu by portraying the latter as oppressive outsiders. He successfully used the ideology of a common ethnicity to construct a national identity for the Han people (P. Chen, 2000). However, by stressing the differences between the Han and Manchu to legitimate his action, Sun's nationalism did not include the other minority ethnicities in China, and thus was essentially a racially-based construct (*ibid.*). The newly established nation-state, the ROC, was in social and political turmoil, as domestically the state was practically destroyed by the Qing dynasty's corruption, which had also left China suffering under a number of unequal treaties with foreign powers. To save China from being divided by foreign invaders in the early years of the new republic, Sun once again appealed to nationalism. This time, by emphasizing the cultural sameness shared by the different ethnic groups, he tried to assimilate the minorities which had previously been excluded (*ibid.*).

However, the unification of the new state did not last long. When Mao Ze-dong established the Communist Party in 1921, a rift between the two groups began, and a subsequent invasion by Japan threw the state back into turmoil. When Sun died in 1925, Chiang Kai-shek became the leader of the KMT. In 1949, after being defeated by the Communist Party, the KMT and Chiang Kai-shek fled to Taiwan, claiming that the party was the only one that legitimately represented the Chinese government.

Chiang Kai-shek not only brought Chinese mainlanders to Taiwan, but also the Chinese nationalist ideology that had arisen on the Mainland. Chiang and the KMT “transformed their nationalist ideologies and incorporated them into Taiwanese life” (P. Chen, 2000, p. 31). This Chinese nationalism was based on the “actual practices and discursive practices of identification with a nation-state’s unity” (*ibid.*), backed up by state policies to “transform its nationalist ideologies into materials, visual signs, or symbolic forms” (P. Chen, 2000, p. 32). The official incorporation of nationalism was presented as the “patriotism” that all good Chinese citizens should have.

Following Japan’s defeat in World War II, the KMT became the governing party on Taiwan, which then became known as the Republic of China (ROC). The KMT’s rule was in many ways similar to Japanese colonial rule, in that it sought to uproot earlier influences, legitimate its regime, shape people’s sense of national community, and impose a Chinese national identity on the island. What was different was that the KMT adopted more drastic means, under the “righteous” cause of “national solidarity” (P. Chen, 2000). The task of assimilating the Taiwanese people was accomplished through a state-controlled compulsory education and curriculum, a monolingual language policy, the rewriting of history, the renaming of streets, and many other measures, all of which changed the Taiwanese people’s sense of an imagined national community (*ibid.*).

The National Language Movement (NLM) was thus developed against this backdrop of “de-Japanization” and “Sinification,” and the Taiwan Provincial Committee for the Promotion and Propagation of the National Language set out its goal as the recovery of the native languages to facilitate the learning of Mandarin via comparison between languages

(Hsiau, 1997). However, what appeared to be a multilingual policy that accommodated the native languages was in reality a monolingual one, because soon after this, in 1950, these languages were forbidden and only Mandarin was allowed. After the Taiwanese uprising of February 28, 1947 (the 228 Incident), the Mandarin-only policy was even more strictly enforced with a view to controlling the populace. The 228 Incident started with protests against the KMT's corruption, and ended with a massacre that had a tremendous influence on shaping a sense of Taiwanese identity. Indeed, this event was closely linked with the Taiwan Independence Movement of the late 1980s and 1990s, as well as the Bentuhua Movement<sup>3</sup>.

In its monolingual policy, the KMT first relegated all non-Mandarin languages in Taiwan, including Taiyu, Hakka, and aboriginal languages, to “dialects,” giving Mandarin a superior status. The use of “dialects” was considered as a barrier to national unity, and the use of non-Mandarin languages on TV and radio broadcasts was progressively reduced until, in 1972 under the Radio and Television Law, almost all broadcasts in dialects were prohibited (Hsiau, 1997).

After decades of strict enforcement, the NLM had a profound influence on the Taiwanese people. Mandarin became the major or even the only language of communication in most families, with younger people speaking it fluently, but knowing little

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<sup>3</sup> The 228 incident of 1947, an anti-mainlander uprising of local Taiwanese people, was violently suppressed by the KMT government, leading to thousands of deaths (Edmonson, 2002; Simpson, 2007). The Taiyu Language Movement started in the late-1980's in resistance to the KMT's Mandarin-only policy. As Taiwan's political power began to shift from the mainlanders to the majority native Taiwanese, this language movement symbolized the awakening of ethnic consciousness (Scott & Tiun, 2007), and was closely linked with the Taiwan Independence Movement of the late 1980s and 1990s and the Bentuhua movement (Makeham & Hsiau, 2005). The latter advocates a unique Taiwanese cultural identity in contrast to a Chinese-centered one, and, like the Independence Movement, is in resistance to Chinese nationalism.

about their parents' languages (M. Chen, 1998; Sandel, 2003). In fact, NLM not only completely changed the language habits of the Taiwanese people, but also shaped their sense of self-identification. Under this policy, in contrast to Mandarin, which was linked with patriotism, refinement, modernity, urbanity and higher socio-economic status, local Taiwanese languages were seen as markers of vulgarity, crudeness, backwardness, and low socio-economic status. As Hsiao (1997) contends, a linguistic hierarchy was thus formed in Taiwanese society which corresponded to the ethnic hierarchy in the political domain, with the mainlanders speaking Mandarin as the dominant force in society, and the Taiwanese speaking local languages as acting in more subservient roles. In 1987, with the lifting of martial law, the Mandarin-only policy that had been enforced in Taiwan for over four decades was officially ended, although its profound influence on the Taiwanese people continued.

The lifting of martial law accelerated the process of liberalization and democratization, and after Lee Teng-hui became the first native-born president in 1988, local Taiwanese consciousness gradually gained strength. Against this backdrop we see the rise of the Bentuhua [Taiwanization] movement which occurred throughout the 1990s. Meanwhile, the major opposition power, the Democratic Progressive Party (DPP), which called for Taiwanese independence, also gained support, and was the ruling party from 2000 to 2008. As mentioned above, the process of democratization led to changes in Taiwanese identity. The concept of "being Taiwanese" changed from the geographically and linguistically distinguished "Bensheng Ren" vs. "Waisheng Ren" at the beginning of KMT rule, to a politically and nationalistically defined "Taiwanese" vs. "Chinese."

After the brief survey of Taiwan's colonial history presented above, the next section reviews some of the important theories and literature that are related to the present research.

### **Review of the Literature**

This review is divided into two parts. The first is on studies concerning language planning and language policy in the context of Taiwan. In the second I review the important literature on (1) identity formation, (2) language, identity, and nationalism, and (3) hegemony, which is organized around the key theorists and their ideas. Taken together, these lay the groundwork for the conceptualization of this research.

### **History of Language and Language Policy in Taiwan**

As mentioned earlier, Taiwan's experiences as a colony provide a good setting for studying not only the history of colonial language policies, but also the impact of such policies on the language-and-environment interaction, on language phenomena like language shift and language endangerment, and on the formation of identity. In recent years there have been many studies on language policy and identity, and from the perspectives of language ecology, anthropology, and language ideology, these have offered many insights into the language-identity relationship.

Seeing an understanding of the local language ecology as the basic step to successful language policy and planning (LPP), M. H. Wu (2011), for example, investigates the history of Taiwan's LPP since the 17<sup>th</sup> century. By "ecology," Wu focuses on how, in a multilingual setting, local languages, their speakers, and their social, cultural, political contexts interact, and how LPP impacts the local language ecology. Recognizing "who plans what for whom and how/ why" (M. H. Wu, 2011, p. 15) as significant in understanding LPP, Wu assesses

Taiwan's LPP history and identifies its changing language ecology. In fact, the value of studying language policy from the perspective of the interactions among language, speakers, and the environment not only lies in its potential in contributing to a better LPP design to avoid language endangerment or extinction, but in helping expose the unequal relationship between the players of an LPP, that is, the "who" and "whom" in Wu's framework, which will further add to our understanding of the process of identity formation among a dominated population.

One of Wu's insights emphasizes Cooper's idea of "organized efforts (e.g., providing more opportunities or incentives) to promote the learning of a language" (as cited in M. H. Wu, 2011, p. 16). I agree that these "organized efforts" are indeed keys to understanding how LPP works, but to shed light on our understanding of the impacts of certain LPP on a focal populace, we need to focus more on the power relations existing in the ecology. In this regard, "what makes the learning of a given language under LPP naturally happen and the project appear unproblematic" is as important as knowing "who," "whom," and "what." In the LPP of both the Japanese colonial government and KMT, incentives were certainly set up with regard to greater empowerment with the adoption of Japanese or Mandarin. But on the part of the policy prescriber, another important aim is to make the planning as unproblematic as possible. Therefore, as is often the case, the promotion of a certain language is linked to nationalism, as well as personal fulfillment, and thus LPP becomes a way to control people's imagined national communities. Usually it is these two things, personal fulfillment and nationalism, that normalize a language policy.

Following Ricento and Hornberger (1996, as cited in M. H. Wu, 2011), Wu argues that



those prescribed by the LPP are not completely passive players, but instead possess the power to shape the policy, and often do. One point worth underlining here is the agency or spontaneity of the prescribed populace, or in the present research, of the dominated Taiwanese people, in participating in this project, although I am cautious about how far LPP planners will choose to give power to the dominated in this way. The shaping or modification of a policy does happen sometimes, as seen in the easing of the Mandarin-only policy and the enforcement of land reforms, but, as Gramsci argues, these steps left the essential components of hegemony untouched (as cited in Jones, 2006).

Friedman (2005) on the other hand, looks at the evolution of Taiwanese linguistic nationalism through an anthropological lens. To be more precise, he examines the link between language and nationalism in terms of language ideologies. With this view, instead of focusing on the changes to the LPP, he emphasizes the historical processes by which these changes took place and the role of human agency in triggering them, as well as how human agency responded to language or nationalistic ideologies in the case of nation formation.

Seeing the construction of linguistic markets and the transformation of language policy as being decided by the interests of nation-state formation, Friedman (2005) argues that language policies, along with their related ideologies, are tools for realizing the establishment of the nation-state. But contrary to the belief that such developments always follow the dominant classes' interests, Friedman proposes two things based on Gramsci's theory of hegemony. First, the realization of hegemony and thus establishment of the nation-state is not completed by the ruling classes alone, but is based on an alliance between the ruling and subaltern classes. The formation of the nation state thus involves negotiation

and compromise between the dominant and the dominated, which is why Friedman argues, following Gramsci, that “ruling classes never rule alone, but always in an alliance with subaltern classes” (2005, p. 6). Second, nationalistic ideologies that legitimate the ruling elites’ hegemonization also do not represent the rulers’ interests alone, but again are the product of negotiation and renegotiation between the allied classes (Friedman, 2005).

Within this framework, Friedman (2005) analyzes the flow of Taiwanese nationalism, from being suppressed under the Japanese and KMT, to the emergence of a new national ideology in recent years. He argues that “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” (p. 5).

While Friedman is right in pointing out the relationship between the elite and dominated classes, which is in accordance with Gramsci’s framework, he fails to underscore one thing in Gramsci’s conceptualization—the ruling classes have the power to make their own world view become that of the subalterns. The subordinated thus adopt the relevant ideologies and become hegemonized, not because they see themselves, their cultures and values in the national formation project, but because they take the ruling powers’ interests as their own (as cited in Ives, 2004). On the part of the dominant classes, this subordination is achieved through consent, which often appears in the form of “symbolic violence” in Bourdieu’s terms, and sometimes actual coercion, so that negotiation and compromise may not necessarily be needed.

A second concern with Friedman arises from his adoption of an anthropological perspective, which, he states, stresses the role of human agency “in bringing about and

responding to these changes” (p. 10). Adequate as his methodology of historical analysis is in identifying the transformation of Taiwan’s language policies and nationalism, empirical evidence concerning how the dominated actually lived and continue to live these changes seem to be absent, although this is a direction worth pursuing, as it will add to our understanding of the process of identity formation under the imposition of a language policy and nationalism.

Sandel (2003) examines how language policies and ideologies affect real language practices in the private realm. Focusing on private language history rather than the public, official history, his research is insightful in that, with empirical evidence, it adds to our understanding of people’s real language choices, such as why one language is used instead of another. Sandel argues that the linguistic ideologies that come from language policies and differentiate languages into superior and inferior ones can trigger different language practices.

While Sandel (2003) does not focus on exposing the unequal power relationships in the enforcement of a language policy, he does identify how people respond to policies which are discriminatory in nature, revealing that people’s language practices reflect the related ideologies, as well as the power that produces these. However, insightful as Sandel (2003) is, by only studying private history without looking into the official side of the discourse it is not possible to know what lies behind the reproduction of the dominant ideologies that trigger not only changes in language practices, but also in identity. In this regard, P. Chen (2000) provides an excellent example showing why studying official history is as important as studying private narratives. P. Chen studies the impact of Chinese nationalism and

nationalistic ideologies on the identity formation of Taiwanese people, or more precisely their becoming Chinese, during Chiang Kai-shek's regime. Inspired by Said's contrapuntal reading (1993) that takes "domination" and "resistance" as the two sides of the power relations, Chen's approach is two-fold. First, with regard to "hegemonization," by looking into the official discourse constructed by the state apparatus using school curricula and rewriting of histories, she shows how dominant values were reproduced in the compulsory educational system to become the "common sense" of the dominated populace; that is, how the KMT's "domination" taught people to become Chinese by manipulating cultural forms like textbooks to transform nationalistic ideologies into "reality." Second, in relation to "resistance," oral histories from interviews were adopted to reveal how people responded to state efforts to make them become Chinese. Did they assimilate or resist these efforts? How did their national identity evolve?

The present research is inspired by the way P. Chen uses school curricula and oral histories to explore the two sides of power relations. However, in studying hegemony, while P. Chen, in accordance with Gramsci, sees the dominantes' resistance as inevitable in the process of domination construction, the present research, also drawing on Gramsci, provides evidence to differently view the relationship between the subordinates and hegemony, which is articulated by their willingness to consent. Methodologically, as Apple (1990) contends, textbooks' reproduction of knowledge is never neutral, but is laden with the dominant ideologies which are easily transmitted into the receivers' world view system without being questioned. Although studying textbooks is a powerful way to investigate how the ruling classes disseminate their values using state apparatus, within the education system, the curriculum is not the only weapon the state utilizes to carry out its nationalist

task. Due to the close link between vernacular languages and nationalism (see for example, Anderson, 2006; Fishman, 1972; Gellner, 1983), language policies that prescribe statuses of languages are as powerful, or even more powerful, than the curriculum, as their impacts reach not only school-age children, but everyone. A multicultural/ multilingual colonial society like Taiwan provides an excellent setting for studying the manipulation of language policies in building up hegemony, and shaping national or cultural identity and the meaning of becoming Taiwanese, in terms of how people actually lived the language policy and ideologies, and this is where the present research enters the realm of studying “becoming Taiwanese.”

### **Key Theorists and Important Concepts**

#### **Hall, others and the issue of cultural identity.**

Culture, in Pratt’s terms, is a “historical reservoir” that nurtures identity (2005). Cultural identity, as its name suggests, refers to the identity of the individuals produced in relation to culture (James, 1995). In discussing the issue of identity, Stuart Hall (1990) points out two basic models of identity formation. The essentialist view, as Hall (1990, 1996) and Grossberg (1996) describe it, stresses the intrinsic and essential link between identity and common origins/ common experiences, and thus sees gender, ethnicity, race, and nationalism as key parts of cultural identity. Such an essentialist position maintains that those individuals “who occupy an identity category are both fundamentally similar to one another and fundamentally different from members of other groups” (Bucholtz & K. Hall, 2004, p. 374). Struggling for construction of identity means trying to discover “the authentic and original content of the identity” (Grossberg, 1996, p. 89). In Hall’s terms, this essentialist model equates cultural identity to a sense of “oneness,” which is defined as

intrinsic and shared by all with the same heritage and origin. Under the essentialist perspective, people with a shared culture will possess certain identity traits that distinguish them from members of other groups, but by stressing the given, distinctive features of identity, this position also stereotypes people.

One problem with this long-standing view of cultural identity is that it fails to explain why twins growing up in exactly the same familial and societal context may find that their experiences of identity differ greatly, when they are supposed to have similar identities due to their shared origin. Neither can it explain why sojourners, diasporic Chinese or Africans develop different identities from their compatriots at home if cultural identities are all about shared roots. Instead of taking the first perspective, Hall argues that identity is a product of history, and as such is shaped by social, political and cultural changes, and is always in a state of flux. We can say that in the first view, cultural identity is like a point in history, which stays there and never changes over time, while in the second perspective, identity is dynamic, flowing with and shaped in the river of history. In the process of change, Hall (1996) recognizes “otherness” and “difference” as the core concepts of identity. As identity is how we view ourselves and how others see us, it thus involves two elements, “us” and “other.” Identity, as Grossberg (1996) argues, is always defined by marking the contrast between difference and similarity, between inclusion and exclusion, between us and others. For Hall, cultural identity goes beyond what one shares with those with the same heritage and culture, the “oneness” or “sameness”; it also originates from ruptures and discontinuities, the “uniqueness” or “difference” (Hall, 1990, p. 224). Besides “oneness” and “uniqueness,” Hall also conceptualizes the two processes of identity formation as the Old and the New Identity/ Ethnicity (1996). The Old Identity is static, with stable discourses of self and

history, whereas in the New Identity the subject is situated in “the contradictory nature of these discourses,” the power relations, as well as “the politics of positioning” (Ibrahim, 2008, p. 237). Taken together, the contrasting aspects, “oneness” and “uniqueness,” “Old” and “New,” define cultural identity as both a matter of becoming as well as being. Hall urges us to conceive of “identity” as “a ‘production,’ which is never complete, always in process” (1990, p. 222). This view of cultural identity formation transcends the essentialist view of linking cultural identity with shared race, ethnicity and nationality, and accommodates differences created at every “point of identification” (Hall, 1990).

Hall’s constructivist view is in practice widely adopted by academics (see for example, Butler, 1990/ 2006, 1993; Calhoun, 1994; Campbell, 2000; Gilroy, 1987; Hall, 1990, 1996; Ibrahim, 2004, 2008; James, 1995; Wittiq, 2003). James (1995), for example, points out that cultural identity is marked by the individuals’ position in a hierarchical social system, and that through socialization, individuals internalize their positions, during which process their identities are shaped. As an individual’s position in a social system keeps changing, because the social context itself does not stay unchanged, cultural identities are dynamic as well as historically, socially and contextually based. Ibrahim contends that identity is “an ongoing ‘event’ of translation and negotiation” (Ibrahim, 2008, p. 237). In discussing race as an identity, he argues that “it is not a category we occupy or slot ourselves into, but a performative category that we ‘do’ every day...it is a historical and social product” (Ibrahim, 2004, p. 77). Hence, following Monique Wittiq (2003, as cited in Ibrahim 2004, p. 77), who argues that “They are seen as black, therefore they are black; they are seen as women, therefore they are women,” Ibrahim claims that one is not born black but one becomes black (Ibrahim, 2004), because a person is judged by the world as black in the first place. In a

similar vein, Judith Butler (1990/ 2006) also asserts that gender, instead of being biologically determined as we have come to understand it, is a social performance that is presupposed culturally, socially, and historically. This position recognizes subjects' agency in identity construction, which, however, is also socially-constrained. This in a sense echoes Gramsci (1971, as cited in Steve, 2006) in how he sees "subjects' spontaneity" as related to the construction of cultural hegemony, which also shapes their identity. Simply put, this position denies the existence of authentic and distinctive identities that originate from a universally shared origin, but instead sees identity as a social construct and people as socialized into their identities. As society keeps changing, so does cultural identity, and this means that identity construction is always unfinished. Therefore, identity is not a fixed category, but instead an ongoing process of construction.

The ideas of Stuart Hall and the theorists noted above lay the ground for the present research, in that Taiwan's long history of being colonized and the Taiwanese people's transformation of their identities well support the second constructivist model. As stated at the beginning, the Taiwanese people's national identity changed with every change of regime on the island. It is thus almost impossible to define Taiwanese-ness as having any "authentic" and "original" content, as Taiwanese identity, being a matter of becoming, is always complexly composed, historically constructed, and never in the same place, just as Bauman (1996, p. 19) notes, "'identity,' though ostensibly a noun, behaves like a verb, albeit a strange one to be sure, it appears only in the future tense."

### **Foucault, others and the issue of discourse.**

Foucault (as cited in Hall, 1997b) sees identity ("subjectivity" in his terms) from the



perspective of discourse, and adds the element of “power” into his view of the formation of identity. The concept of “discourse” is central to Foucault’s conceptualization of the relationships between the subject and society, or the Self and the Other. Foucault does not talk about “discourse” in the linguistic sense or in a way similar to how semiotics sees “language”--“a coherent or rational body of speech or writing: a speech, or a sermon” (Hall, 1997b, p. 56). Instead, his approach goes beyond “language” and “representation,” and enters the socio-political realm. Simply put, Foucault sees “discourse” as concerned with the production of knowledge, which is supported by and supports power. Knowledge about a particular subject is produced because of power relations, so that we can say that discourse produces and prescribes the knowledge which represents a subject (Hall, 1997a). For example, in Hall’s analysis of the discourse of “the West” and “the Rest,” discourse is “a particular way of representing ‘the West,’ ‘the Rest,’ and the relations between them” (1997a, p. 56). This speaks to Foucault’s argument that nothing meaningful exists outside discourse (Foucault, 1972, as cited in Hall, 1996), simply because every social practice entails meaning and the meaning/ knowledge of everything is prescribed by discourse. In discourse, the knowledge that represents a subject becomes “truth” because of the real effect discourse has on the subject, which is almost always linked to “a contestation over power” (Hall, 1997b, p. 57). According to Foucault, “Each society has its regime of truth... that is, the types of discourse which it accepts and makes function as true...the status of those who are charged with saying what counts as true” (Foucault, 1980b, p. 131).

Therefore, “truth isn’t outside power,” in the same way the production of knowledge and thus discourse cannot operate outside it (Hall, 1997b). Besides power, Foucault’s “discourse” is also radically historicized. Knowledge, truth, and discourse are only

meaningful in the historical context in which they are produced (Hall, 1997a). This is equal to saying that “in each period, discourse produced forms of knowledge, objects, subjects and practices of knowledge, which differed radically from period to period” (as noted by Hall, 1997a, p. 46).

As for the place subjects take in a discourse, for Foucault they are empty entities who enter the process of knowledge production or a system of discourse (Foucault, 1980a), slotted into subject positions by power relations. Subjects are thus always controlled by the discursive formations of the society. In other words, there are no active players in this process, but only discourse and power relations. Focusing on the shifting patterns of power within a society, and the manner in which power relates to the self, Foucault claims that subjectivity, which can be defined as “how the individuals understand the world, a combination of their upbringing, particular background, and current and past experiences,” thus is not “given” but is an effect of power, knowledge, and other influences (Foucault, 1994). If we see it in Gramsci’s terms, Foucault’s “subjectivity” is actually what Gramsci refers to as “the subalterns’ world view,” which is central to the exercise of power and the construction of hegemony (Gramsci, 1971, as cited in Ives, 2004).

Following Foucault, Weedon (1996) adopts a post-structural feminist view and identified subjectivity as multiple and non-unitary, as a site of struggle, and as always changing over time, produced in the societal network of power relations. Norton (2000), drawing on Weedon (1996), views language learning as a site where power relations are defined and where an individual’s subjectivity is constructed. Butler (1993) contends that gender identity, instead of being intrinsic, is a performative entity prescribed in discursive

formation. Women are in turn prompted to “perform” consistently with the expectations of society. This view of “performativity” echoes Foucault, who claims that subjectivity is not pre-given, but produced in power and discourse. But while individual agency is denied in Foucault’s view of subjectivity formation, the performativist view recognizes it. In a similar vein, as mentioned earlier, Ibrahim (2008) views race as a performative category. Becoming black therefore has two-fold meanings—the prescription of dominant groups as to the definition of “blackness,” which in turn teaches people to become black (Hall, 2006; Ibrahim, 2004, 2008). This “identity as a performative category” view is also shared by Gilroy (1987), who argues that black subjects’ identities were produced and reproduced in British society based on its popular nationalism and patriotism, and that this drove the black community to use their own popular culture as a site to shape the construction of black identity.

The present project draws on Foucault’s conception of “discourse” in three ways. First, a discourse is comprised of several interrelated statements that work together to form a “discursive formation” to refer to situations or actions (Hall, 1996). Consequently, there is “coherence” among these interrelated texts (van Dijk, 2000, p. 40). More importantly, besides referring to the same object, they make common reference to “who can speak, when, where and with what authority” (Ball, 2006, p. 48). That is, a discourse is more than language and speech, as it also includes the effects of this language and speech. Power relations are thus at play in the formation of discourse.

Second, by ordering and combining words in particular ways and excluding other combinations, discourse creates certain kinds of knowledge about the subjects of the

discourse (Ball, 2006, p. 48), while at the same time, silencing other forms. The dominant discourse excludes alternative discourses, and has a great power over the way people perceive the subjects of the discourse, and as a result profoundly shapes the structure of society (Foucault, 1980a).

Third, “discourses are not closed systems” (Hall, 1997b, p. 56), as they are linked with and supported by other discourses in a “web of discourses,” which come to produce a “regime of truth” specific to the society. As Phillips and Hardy (2002) put it, discourses are always connected to other discourses “which were produced earlier, as well as those which are produced synchronically and subsequently” (p. 4). Knowledge is produced by these competing discourses, and each of them concerns a contestation over power, and this also means that a discourse needs to be studied in relation to the other discourses that it draws on.

Seen from the three perspectives, during the Mandarin-only policy era the knowledge of things such as Bensheng and Waisheng, Taiyu and Mandarin was produced and reproduced in power relations, so that Taiwanese-ness was represented as a special way of talking about Taiwanese people and their culture/ language, just as Chineseness is a way of talking about Waisheng Ren and their culture/ language. The dominance of Mandarin and Waisheng Ren were established by these specific ways of representing people and things, and thus ultimately the hegemony of the KMT. Therefore we can say that the KMT’s hegemony was sustained by the discourses that were created in its historical context, which included the superiority of Mandarin and Waisheng Ren, in contrast to the inferiority of Taiyu and Taiwanese-ness. All of these discourses were interrelated, drawing on and supporting each other.

But while the present research builds on Foucault and sees “power” as always in the background of identity construction, it differs in that it further recognizes the “performativity” or the role of “agency” in identity formation. Are individuals simply summoned by social context into the ongoing process of identity formation, without their agency or desire playing a role? If so, then why in many cases are sojourners or immigrants, especially first generation ones, unable to adopt new identities based on those of their host societies, even after many years of living there? In addition to being socially constructed, it is because cultural identity is also about what individuals do to adapt to the material as well as symbolic environment. It is about how individuals position themselves as well as how they are positioned by discourses. In short, it is about how individuals live discourses, and the “desire for self-fulfillment” plays a key role in this active agency. According to Norton (2000), our identity/ subjectivity references our desire for recognition, for belonging to, and for affiliation. The same desire positions individuals as active players in their identity formation, as not just positioned by discourses, but also as beings who actively position themselves. Norton argues that although subjectivity is produced in various social sites structured by power relations, “the subject, in turn, is not conceived of as passive; he or she is conceived of as both subject of and subject to relations of power within a particular site...the subject has human agency” (*Ibid.*, p. 127). This statement clearly reveals the relationship between subject as active agency and the formation of identity. Both the agency and desire of the subjects are at play, when at the same time power and discourses constrain how individuals can exercise their agency and articulate their identity. Such a view echoes Gramsci when he contends “our being constrained by our historical conditions, and yet being human agents capable of mobilizing and organizing to change our world” (Ives,

2004, p. 8).

Honig's study (1992) of a sojourner group in metropolitan Shanghai provides an example that supports this perspective. She contends that a new ethnicity, Subei people in Shanghai, never fit in with the Shanghai cultural identity, no matter how long they have been there. Their adaptation to the host environment has thus created a different identity from the one their compatriots at home have, although it is still not a metropolitan one. In fact, Subei people do not exist as an ethnicity, except in Shanghai, and thus this is an identity that emerges from the power relations of the dominant society, yet also shows how the agency of the dominated can create its own identity.

This realization has important implications for the present research. I am using the concept of "becoming Taiwanese" to accommodate identity formation as a process that involves the self, the other, the environment, the dynamic linkage between them, and the subject's active agency. The adoption of the term "identity" recognizes it as a combination of how external forces define a person's being and how he or she articulates it. It also recognizes things like "other," "difference," and "distinction" and the fact that they are part of identity. Exploring "identity" not only reveals the formation of one's subjectivity, but it also unveils the role of external forces, such as power and hegemony, in shaping subjectivity into an identity. Becoming Taiwanese is, in my conceptualization, a process of subjectivization, where the Self takes up his/her position in relation to the Other and articulates his/her identification and desire (for affiliation, empowerment, resistance) in social practices such as language and education.

**Heller, Ibrahim, Pennycook, others and the issue of language and life-course identity development.**

Language, according to Hall (1997a), is a “representation system,” where meanings are mirrored, reflected, and constructed, and identities are made. Although often taken as a neutral construct that has existed from time memorial, language is not unproblematic when its function goes beyond the privileged media or tools of communication. Makoni and Pennycook (2007) challenge this conception, and claim that languages are human inventions, social constructions, which are “made real” via social and semiotic processes. Once invented, the way they are imagined, identified, and mapped promote ideologies that can have “very real and material effects” on the world (p. 2), which explains why language is not just viewed as the “home of identity,” but the “highroad to history/ glorious past” (Fishman, 1972), and even the “means to national solidarity” (Anderson, 2006; Heller, 2006; May, 2001).

On the personal identity development front, Canagarajah’s argument that “what motivates the learning of a language is the construction of the identities we desire” explicitly identifies the close association between language learning and identity construction (2004, p. 117). Monica Heller’s study (1987) specifically points out how the mechanisms of language learning link to identity construction. Heller contends that through language individuals negotiate a sense of self within different sites at different points of time, as well as gain access to social power networks. Two things are highlighted in her argument. First, one’s “self” and “subjectivity,” and thus “identity,” are formed at different locations and times, and so are multiple constructions. Second, Heller’s statement, echoing Bourdieu’s concept of “cultural capital,” highlights the concept of “desire” and can explain

why people may adopt a completely unfamiliar language, not only in Taiwan, but all over the world. The theory of cultural capital posits that individuals invest their time and other resources to identify with a group with a view to “acquiring a wider range of symbolic and material resources, which will in turn increase the value of their cultural capital” (Norton, 2000, p. 10). People voluntarily or involuntarily shift to a language of power, or in Gramsci’s terms, absorb the interests and world view of the dominant group, because of their desire to find empowerment through that language. Seen in this way, language learning is not neutral, but political. Based on Makoni and Pennycook’s conceptualization of language as an invention, we can understand how this invention has the power to affect people and society with its “very real and material effects” (2007, p. 2).

Adopting a methodology termed “ethnography of performance” to study how immigrant African Canadian students articulated identity in second language learning contexts, Ibrahim identifies language as a performance of identity. He contends that hip-hop, as not only a form of music but also a language practice, as well as Black English, are taken as sites of empowerment and resistance, where these young people’s “black identity” is negotiated, adapted, and articulated (Ibrahim, 2008; 2009).

Pennycook approaches English language teaching (ELT) from a political and social perspective, and argues that language learning is more complex than just skill training, and that the ELT classroom, instead of being a neutral learning space, should be seen as a site of struggle, a complex social and cultural space that shapes identity (Pennycook, 1998, 1999). Like Ibrahim, in seeing hip-hop as a performative transcultural practice and pedagogy, Pennycook and his concept of “global Englishes” obliges us to rethink the relationship



between language, culture and identity in the contemporary globalized world, where power should stop deciding what form of language is considered “correct” or “authentic” (Pennycook, 2007; Alim, Ibrahim, & Pennycook, 2009).

Also approaching language learning as a social and political practice, instead of just a skill, Norton (2000) carries out a longitudinal study of immigrant women in Canada and confirms that language learning engages the changing identities of the participants, as well as the power relations between language learners and the host society. As such, second language learning theory should give adequate attention to the concept of identity. This again echoes Pennycook (2007) and Ibrahim (2004, 2008), in that for minority groups and women language learning is an investment of desire and a means of empowerment, one that takes place through the negotiation of identity.

The present project builds on the insights of these theorists in two respects, based on the fact that Taiwanese people adopted Mandarin to get educated and achieve self-fulfillment during the Mandarin-only policy era. First, it is power that establishes some form of language as “correct” while others as not, which in turn decides what people invest their desire in to get empowered. Second, the need for empowerment is reflected in both gender and racial groups, as the above theorists contend, while in the case of Taiwan it is also reflected in class differences, where people from middle class backgrounds show a particularly strong desire for empowerment, and thus they are more vulnerable to the government’s hegemonic forces. Third, the desire for empowerment also highlights the role of individual agency in participating in language adoption/ learning and making language a performance in their construction of an identity. All of these factors will be examined in

more detail based in the research participants' accounts in Chapters 4 to 7.

### **Billig and the issue of language and nationalism.**

As mentioned earlier, Makoni and Pennycook's study (2007) reveals the ideological nature of language. It is therefore not difficult to expect that beyond the function of communication, beyond its link with culture and identity, language also encompasses political dimensions. Because of this ideological function, language is used not only as a personal identity or ethnic marker, but also as a nationalistic one. The notion of a language expressing national spirit has become popular since the nineteenth century (Cameron, 2007). Fishman (1972), for example, provides an insightful explanation of the intimate link between national discourses and language planning, between national identity and the mother language. He contends that the way a mother language is viewed as the high road to history and a glorious past in the concept of national identity gives it an almost sacred status, viewed as the mysterious vehicle of all national endeavors. This view explains why nationalist movements often choose language as a rallying point for promoting the construction and legitimation of the nation (Anderson, 2006; Heller, 2006; May, 2001).

This nationalist, essentialist view of seeing language as naturally linked to national identity is, however, challenged by Edwards (1985), who argues that although ethnic identity often builds on language as an important group boundary marker, language is not the only or even the most crucial of such markers. He views the two aspects of language, as both a communication tool and a symbol of groupness, as separate, since the latter function can remain even in the absence of the former. As such, when language is lost or when language shifts occur, ethnicity remains, because the function of language as a group marker is

replaced by other markers. On this basis he argues that there is not necessarily an essential link between language and ethnicity/ nationalism, but a sense of groupness is the most important marker that can replace the function of language as boundary marker of group identity. Such a view echoes Renan (1882/ 1990,) who proposes that it is the will, a sense of sharing, and a capacity to forget, and not necessarily language, that constitute nationhood and capture the essence of nationalism. Similarly, Smith (1971) rejects the association between language and national identity, but contends that people have a natural allegiance to the ideas of nation and nation-state, which are not necessarily formed via language.

Anderson (2006) contends that nation-states are imagined communities that are formed based on subjective imaginings rather than objective criteria, such as language, religion, or geography. Billig further asserts that “languages are imagined products of the imagined community,” and just as the nation-state is the creation of modernity, so is language (Billig, 1995, p. 31). Nevertheless, imagined as they have always been, the nation-state and language are represented as if they existed from time immemorial, and the linkage between them is imagined as natural. The reason why a language is created is to help sustain the nation-state, and thus the nationalists often present the language-nationalism link as a “common sense” one, and the pursuit of national solidarity through the standardization of language has thus been a major task in the history of many modern nations. Billig’s anti-essentialist theory of nationalism, however, cautions us to pay more attention to the power of modern nationalism, which has become powerfully ideological yet harder to be detected. Instead of appearing in the form of “nationalist passion,” as Giddens terms it, that occurs “in fairly unusual and often relatively transitory conditions” (1985, p. 218), modern nationalism appears on a daily, banal basis, which makes it largely unexamined and

unchallenged, and thus very powerful (Billig, 1995).

Billig and his perspective of nationalism and language shed light on the present research. In Taiwan, language, which is often linked with ethnicity, has frequently been used by political activists to mobilize the populace with regard to their sense of national identity, to the point that the issue of language seems to be inseparable from those of nationalism and ethnicity. Like many nationalistic movements, the Mandarin-only policy also used the taken-for-granted, “natural” link between language and nationalism to infuse nationalism into people’s everyday lives. It is because nation-states, once they come into being, need to be sustained, and the supposedly intimate link between language and nationhood that nationalists promote can be used to achieve this. Because this link is seen as a common sense one, the mechanisms underlying language hegemony tend to go unnoticed and unchallenged. In the context of Taiwan, this fundamentally affected not only how people saw Mandarin, but also how they viewed Taiyu, which in turn shaped the meaning of “being Taiwanese” for them.

### **Gramsci and the issue of hegemony.**

Gramsci’s concept of “hegemony” arises from his study of the working class’s revolt in 19th century Italy. Specifically, he claims that the failure to successfully construct a hegemonic bloc by building alliances leads to the defeat of this uprising. Gramsci thus sees the establishment of cultural hegemony as fundamental to the attainment of power. In other words, hegemony for Gramsci is a means to maintain cultural and political supremacy for the ruling powers, and he describes “hegemony” as follows:

The working class can only become the leading and the dominant [i.e. hegemonic] class

to the extent that it succeeds in creating a system of class alliances which allows it to mobilize the majority of the working population against capitalism and the bourgeois State. (as cited in Jones, 2006, p. 45)

Acquiring leadership by creating a system of class alliances is the essence of “hegemony”; however, for Gramsci, the notion of hegemony is more than about “the alliance of class,” but it relies greatly on “the organization of consent” (as cited in Ives, 2004, p. 64). Three elements stand out in Gramsci’s conceptualization of hegemony. The first is “subalternity” which arises from one group acquiring leadership, while subalternizing others, and this also underlies the agency of the leading group to speak for and make decisions for the subordinated ones. Gramsci, however, does not equate “hegemony” with “sheer dominance,” as the agency in the former is granted based on the subalterns’ consent, while in the latter the agency is acquired through the one-way imposition of the ruling class’ world view, rather than a two-way process of interaction and compromise. This distinction, according to Gramsci, explains why masses of people recognize or support the government which works against their interests (Ives, 2004).

The second element to note in Gramsci’s definition of hegemony is the concept of “mobilization.” To rise to a position of leadership, the leading group has to mobilize its allied subaltern groups against the bourgeoisie. On the part of those being mobilized, to accept the leadership of others means to adopt the dominant bloc’s world view as their own. However, we may wonder, like Jones (2006), why do people accept the leadership of another group? The answer, according to Jones, lies in the nature of hegemony, which takes economic, cultural, political forms, rather than simply involving a set of values (*Ibid.*). People are thus willing to accept the leadership of others and be mobilized by them, because

they feel a need to survive and get empowerment. Gramsci himself has an answer to this question from the perspective of language and world view, which I will come to in the following section. With regard to the process of mobilization, Gramsci (1971, as cited in Jones, 2006) dismisses the idea of seeing the subalterns as “unthinking conformists” who are only the dupes of the dominant power. Rather, to some extent, subordinate people make their own choices to participate in the hegemonic process, and this involves Gramsci’s central concepts of “consent” and “spontaneity,” which will also be discussed in the following section.

The concept of mobilization also points to how the ruling powers acquire and maintain legitimacy, as a third noteworthy element in Gramsci’s definition of hegemony. Gramsci recognizes two devices, “consent” and “coercion,” as characterizing the nature of hegemony, with the former being his preferred and ideal form of successful hegemony, while the latter appeals to armed and judicial force as a way to get leadership. In this respect, Gramsci distinguishes two apparatuses of maintaining dominance and ruling a national bloc. One is “political society,” where legal-political and judicial discipline is exerted. The other is “civil society,” where leadership is maintained via acquiring the subalterns’ consent. As Jones (2006) puts it, “Gramsci’s more common definition of hegemony is consequently of a situation synonymous with consent. Civil society, he [Gramsci] argues, corresponds to the function of hegemony, while political society corresponds to ‘domination’” (p. 52). Ives (2004) also asserts that Gramsci’s theory of hegemony is based on “the complex relationship between coercion and consent,” especially on “the organization of consent” (p. 64).

That said, although Gramsci marks the process of acquiring people’s full and active

consent as an important sign of modern society's "democratic impulse" (Jones, 2006, p. 47), he also claims that all hegemonic processes involve both coercion and consent. Especially in a modern national bloc, the line between the two is not always clear-cut but instead blurred, which makes the nature of modern society complex. Through ideological operations that disseminate dominant meanings and values, people do not simply reject the use of coercion. In many cases, they give consent to the use of it, usually under circumstances in which a secure livelihood can be ensured (Jones, 2006). Moreover, the fact that the use of coercion in modern democracies has shifted significantly from Gramsci's sense of force, which is the overt use of armed or judicial force, to more symbolic and subtle forms, has further complicated the nature of modern hegemony. The use of coercion by ruling powers is still common, but is more often in line with what Bourdieu sees as "symbolic violence," which makes people aspire to reproduce the dominant values to ward off being excluded, silenced, or marginalized (Jones, 2006; Bourdieu, 2000). In this way the ruling powers can maintain a social structure without resorting to repression or direct violence (Wolfreys, 2000). As put by Ives (2004), language hegemony, in particular, is established "predominantly not by government or state coercion, military or police action, but by speakers accepting the prestige and utility of new languages" (p. 7). Jones (2006) writes about this softer version of coercion as follows:

...texts perform symbolic violence in the exclusions they perform and the silences they impose upon outsider groups. But symbolic violence also takes the form of taste judgment, where outsiders are marginalized and shamed; of physical behavior and 'way of living' where some feel confident and others feel awkward; and in the unique distribution of educational qualifications. In these cases, a ruling power will see its

authority reproduced, a subaltern group will aspire to the values and tastes of its superiors, and a 'dominated' group will see its lowly status reinforced. (p. 52)

Three things in the above discussion are closely connected to the present research. First, in line with Ives' (2004) reading of Gramsci, which sees that the construction of modern hegemony is a combination of consent and coercion, military dominance and cultural superiority, the KMT's rule in Taiwan was carried out using a combination of armed domination and cultural hegemony. The 228 Incident of 1948, as well as the subsequent White Terror era, imposed armed and judicial discipline over Taiwanese citizens who did not give their consent to KMT rule and thus threatened the legitimacy of the ruling power. The construction of the KMT's cultural hegemony, on the other hand, largely depended on political, economic and cultural ideological operations that included the imposition of Mandarin on the populace, and the use of Bourdieu's "symbolic violence." These mechanisms of symbolic violence produced and reproduced "being Chinese" and "speaking Mandarin" as a matter of good taste and a symbol of class distinction. On the other hand, not being able to speak Mandarin meant having no way to communicate with the dominant power, and thus no access to educational, cultural, political, and economic distinctions. In this way, learning Mandarin at school was made normal and neutral. As Wolfreys (2000) put it,

The reproduction of structures of domination in society therefore depends on the imposition of cultural values which are presented as universal but whose content and context are politically and historically determined--and therefore arbitrary.

("Reproduction," para. 2)

As will be discussed in the following section, the imposition of a new language was a way to



impose a different system of perception, which by its very nature was artificial. However, to the dominated Taiwanese people, the arbitrary cultural value of being able to speak Mandarin became natural and unproblematic. The mechanisms of hegemony at play here worked in the way that Bourdieu notes, as follows:

...the coercion which is set up only through the consent that the dominated cannot fail to give to the dominator...when their understanding of the situation and relation can only use instruments of knowledge that they have in common with the dominator, which, being merely an incorporated form of the structure of the relation of domination, make this relationship appear as natural. (Bourdieu, 2000, p170)

These mechanisms account for how the dominance of Chineseness, Waisheng-ness and Mandarin was reproduced as normal, and learning Mandarin was commonly represented as a way to achieve success in the minds of those who grew up in the Mandarin-only era. The way this process works also points to the second important link between Gramsci's concept of "hegemony" and this research—the subordinates' participation in the hegemonic process, through the "consent" they give to the ruling powers. While in certain violent instances, like the 228 Incident and White Terror era, people were passively dominated and forced to obey the dominant class, in the general construction of the KMT's cultural hegemony they were not coerced, but instead believed that moving toward the dominant world view was good for them. People thus actually gave their consent and took part in the hegemonizing process. Hegemony, therefore, involves human agency in the giving of consent. In other words, the dominated in fact exert their agency, which testifies that the governments rule legitimately because of hegemony rather than domination. As the interviewees discussed in this research revealed, they learned Mandarin not only because it appeared to be natural and

normal, with “everybody” learning it, but also because they believed their futures lay in being able to speak Mandarin well. In short, they wanted to speak good Mandarin to avoid the symbolic violence of feeling excluded and marginalized. Meanwhile when Mandarin and Waisheng-ness were reproduced as dominant values, many people felt that the low status of their home culture and home language were being reinforced, and thus they naturally moved toward the higher values that Mandarin represented. In this sense, people spontaneously and voluntarily participated in the reproduction of the structures of domination by following the dominant values.

As passive as the acceptance of the dominant values was, all these mechanisms behind the ruling power’s domination and the populace’s decision to participate in the hegemonic process inevitably shaped and reshaped people’s identification and became what made their sense of Taiwanese-ness, as they contested the meaning of their home language, their Taiwanese identity and the meaning of Chineseness and Mandarin. If we see “hegemonic construction” from Hall’s perspective, it is as if the ruling powers brought ruptures, discontinuities and histories to the subordinates, which shaped their identities. This inevitably made their identity formation, like the KMT’s hegemonic construction, a site of struggle, where meanings were always being contested.

The third aspect that links Gramsci to the present research is that the construction of hegemony is a process without an end, because, according to Gramsci, a hegemonizing group cannot avoid encountering the subalterns’ challenges to its leadership, and accordingly being forced to engage in negotiation with and accommodation of the subordinates’ cultures, although he also insists that “such sacrifices and such a compromise cannot touch the

essential” (as cited in Jones, 2006, p. 47). In the case of KMT’s hegemony in Taiwan, its authority not only faced challenges from the subordinate locals, but also from the local and international environments of the time, so that as we will see in the following chapters, for the purpose of maintaining legitimacy, adjustments were made at different stages, from the accommodation of home languages at the beginning, to land reforms in the 1960s and 70s, to accommodate Taiwanese elites. In order to maintain leadership, changes and compromises were necessary, but they never altered the fundamental project, which was the construction of KMT hegemony.

Within the framework of “hegemony,” my research also builds on Gramsci’s insight on language as a hegemonic formation, an element in the operation of power, which, as elaborated by Ives (2004), means “how a given population adopted a particular linguistic form, parts of a language or an entire language from another group of people” (p. 47).

Upon Italy’s unification in 1861, Gramsci opposed the promotion of Esperanto as the Italian national language, or the adoption of Florentine, a dialect used in the north, in the rest of the new country. His opposition was not due to an empirical concern with whether Esperanto would work because of its artificiality, but instead to a concern over the hegemonic nature of such an imposition on the populace. Given the unequal capitalist policies that favored the North rather than the South, and thus ghettoized the latter (Ives, 2004), he saw the top-down imposition of Esperanto or Florentine as forcing the southern subalterns to submit to the ruling power’s world views or ideologies, and thus what was a living language for the northern elite was in fact a dead and useless one for the southern peasantry class (p. 58). As Ives contends,

While hegemony seems absent from his discussion of Esperanto in 1918 and in the Prison Notebooks, as with the term ‘hegemony’, Gramsci uses ‘Esperanto’ to connect his cultural and political analysis of how ruling classes are able (or unable) to impose their visions of the world and propagate general ideologies that do not represent subaltern classes, to his philosophical and epistemological critiques of positivism and his concern with scientific and philosophical methodology and knowledge production. (p. 60)

In other words, the imposition involves what Gramsci later terms the ruling power’s general world views becoming the subaltern class’s “common sense” in a manner that is against their interests.

In this “language as a hegemonic element” framework, we may ask several questions linking Gramsci’s insights to the present research. The first is “What are the mechanisms that represent language as a constituent element to exercise power and implement hegemony?” Besides seeing the subordinates’ desire for empowerment behind their adoption of the dominant language, as mentioned earlier, Gramsci interprets subalternity from the perspective of how people make meaning of the world through language. Every language, Gramsci claims, represents a specific system of world views. The world view system of regional dialects, however, in the view of Gramsci, is incomplete and incoherent, in contrast to that of the standard language (as cited in Ives, 2004). According to Gramsci, what makes subalternity is the subalterns’ lack of “a coherent world view from which to understand and interpret the world” (Ives, 2004, p. 78). The subalterns thus work with a “common sense” adopted from the ruling class rather than on a coherent world view of their own. By imposing a new language, the ruling class is transplanting their world view onto

the subalterns (Ives, 2004) and this reflects the logic behind the use of language by the ruling power as a tool to create hegemony. According to Gramsci, being geographically-restricted, dialect speakers are doomed to have a limited, incomplete conception of the world. Gramsci thus does not oppose having a standard language for Italy, but only the way that this policy was carried out.

Gramsci's insights here at least leave one unanswered question—"Is the subordinates' lack of coherent world view inherently due to the dialects they speak, or is their incoherent world view a result of their subordinate status?" While Gramsci does not seem to have elaborated on this issue, I doubt that the latter is true for Taiwanese people, for two reasons. First, in many cases, a standard language, before it is made standard, is also a dialect. Mandarin, for example, is based on a dialect spoken mostly in the north of China. Therefore, speaking Ta-yu as a dialect alone does not make Taiyu speakers subordinate, for Mandarin was as much a dialect as Taiyu before it was made the national language. Second, the repeatedly subordinated and colonized status of Taiwan has imposed on the population different world views from different ruling powers, which may have caused their world views and identifications to become fragmented and disconnected. As Hall (1990) contends, the ruptures and discontinuities of history give an identity its "uniqueness." Subjects like the Taiwanese people, who have undergone a continuous sequence of subordinate experiences, are thus continually situated in the conflicts of various discourses. The incomplete world views that the population may have can thus be seen as the traces various histories have left on their identities. In the present research, interviewees, in particular those who grew up during the transition from Japanese to KMT rule, did report disturbed and disconnected processes of identification formation, which testifies to the impact of the

unholistic world view that has long prevailed on this island. In this respect, Gramsci's concept of world view offers great insights into how language hegemony, like with the Mandarin-only policy, can have a fundamental impact on the subordinates' sense of identification.

In the "language and hegemony" conceptualization, the second question that stands out is "Who manipulates language as a hegemonic formation?" With regard to this issue, Gramsci recognizes the role of institutions, including schools, churches, and the media, in the framework of hegemony, just as he recognizes people's desire for empowerment also plays a role in this process. Gramsci connects these two ideas by stating that people's values and desires are often shaped and reshaped by institutional arrangement and expectations (Ives, 2004, p. 83). Institutions use power, not necessarily in the form of coercion, to disseminate dominant values and create a view of the world. Recognizing people's desire, on the other hand, is equal to saying that, to some extent, the subaltern classes are also involved in making the hegemonic bloc. At first the subalterns involuntarily become chess pieces in a hegemonic game, but once they are in it, they are exercised by the desire for prestige, cultural and economic excellence, and empowerment, to move toward the higher values that the dominant language represents. All of these happen because hegemony is based on political, cultural, social and economic dominance, which makes people feel inferior about their own culture, without realizing that this dominance and superiority is created in and reinforced by the institutional structures of society.

The exploration of the second question further leads to the third question—"What makes the subalterns willing to give their consent to adopt a new language, without much

resistance, in the case of Mandarin in Taiwan as well as Esperanto in Italy?” In the case of the promotion of Esperanto, while this was, as Gramsci notes, “against popular will,” it did not meet with much resistance from the bottom. Quite the contrary, as Gramsci writes that “the workers are interested in it and manage to waste their time over it” (as cited in Ives, 2004, p. 60). Gramsci attributes the reasons for this to the factors “attraction,” “prestige,” and “hegemony.” Simply put, he claims that it is the cultural, social, and economic superiorities of the new language, as well as the desire for empowerment, that motivate subordinates to learn it. Similar to the situation in Italy at the point of unification, very few people in Taiwan knew the language that was going to be imposed as the national one, Mandarin, when the KMT first arrived on the island. But after a few years of its promotion, the participants in this research recalled that they “naturally” learned Mandarin, without asking why they learned a language not spoken by their parents, or feeling that it was being imposed upon them. They also stated that the aspiration to speak Mandarin well came from the knowledge that the language was closely linked to a better livelihood in the future. Although memories are often filtered by people’s subsequent experiences, and it is likely that the participants actually had more resistance back then which they do not remember now, the participants’ middle-class backgrounds do suggest their strong eagerness to get ahead in society, and thus their greater dependence on language adoption for empowerment. Like the subaltern class in Gramsci’s Italy, research participants and their parents gave their consent to be hegemonized, and it was just the degree of involvement that differed, with some participants showing some resistance, while most readily moved toward the dominant culture and language, learning to disdain their home language.

The subordinate group’s “subjectivity” is noted here, or what Gramsci terms its

“spontaneity.” Against the above discussion of “desire,” “consent,” “prestige,” and “empowerment,” “spontaneity” can easily be identified as being based on “free will,” enacted in a “voluntary act as opposed to those that are coerced or induced by fear” (Ives, 2004, p. 90). However, seeing it as purely “coming from within, not subject to external forces” (*Ibid.*) will be misleading, in that it obscures the “unnaturalness” and “problematicness” of the hegemonizing process. That is, the spontaneity of the subaltern group, as mentioned earlier, actually springs from the “prestige” and “attraction” which are created and shaped by institutions. “Spontaneity” is thus in fact not as unproblematic as it seems, as in it we should see the marginality of the subordinate and the unnaturalness of construction of hegemony. In this respect, Gramsci’s argument is worth quoting in full here.

The term ‘spontaneity’ can be variously defined, for the phenomenon to which it refers is many-sided. Meanwhile it must be stressed that ‘pure’ spontaneity does not exist in history...It may be said that spontaneity is therefore the characteristic of the ‘history of the subaltern classes,’ and indeed of their most marginal and peripheral elements. (as cited in Ives, p. 97)

What Gramsci really cautions in “spontaneity” is thus that we should be critical of it and look for the traces of hegemony left on the subalterns, i.e. their marginality. Rather than taking the spontaneity of the subaltern class as the source of their free will or the motivation behind their agency, we need to recognize it as a product of the historical process and hegemonic forces. We need to create an inventory of all the traces left, in Gramsci’s terms, so that the exercise of power behind the spontaneity is exposed (Ives, 2004).

The significance of this observation in the case of the promotion of Mandarin is



two-fold. First, what participants refer to as normal and natural is not at all unproblematic. The exercise of power to create consent, transplant world views, produce the subalterns' spontaneity, all need to be investigated critically. After all, just as Gramsci argues, the exercise of power often blurs the distinction between political authority and everyday life, which makes everything seem apolitical and just part of people's lived reality, when in fact it is not (as cited in Jones, 2006). Second, power gets to decide how a particular identity, dominant or minority, should be represented. Therefore, what is interpreted as the "spontaneity," "consent," and "desire" of the subordinates should be re-investigated to expose the role of power and hegemony in the making of Taiwanese identity.

### **Conceptual Framework of the Research: A Summary**

This chapter presents the ethnolinguistic composition and brief history of Taiwan, as background information, and it reviews studies on the history of language and language history in Taiwan to illustrate where the present project stands and what it adds to previous work. Moreover, the literature review deals with the key theories upon which this research bases its conceptual framework. As has been revealed at the end of each section in this chapter, each of the key concepts, including "language," "identity," "discourse," "nationalism," and "hegemony," links to the present research into Taiwanese identity. Together, these inter-related theories frame the study and help explain what "becoming Taiwanese" is.

## **Chapter 3 Methodology**

In this chapter, I present the theoretical orientation that guides the methodological design of the present project. This overview is then followed by a description of the rationale for the design, and of the data collection and analysis methods used in this work.

The research uses two types of data from interviews and public documents, yielded and processed by two different research methods, with focus group interviews as the primary data and public documents as the secondary data. The methodology is theoretically situated in two orientations, an adaptation of oral history method to the use of focus group interviews and Critical Discourse Analysis (CDA) supporting the analysis of the data obtained from both public documents and interviews.

### **Theoretical Orientation**

#### **Oral History and Focus Group Interview**

The primary methodology used in this research is an adaptation of oral history that guides the use of focus group interviews.

Oral history, seen as enabling the “systematic collection of living people's testimony about their own experiences” (Moyer, 1999), is an important historical approach. When documents for studying an event, time period or people are difficult to obtain, oral history is used by historians to yield new evidence, usually obtained through interviews. For example, the Canadian historian Alison Marshall (2011), in her book that explores early Chinese bachelor settlers' lives and their relationship with Sun Yat-sen's KMT and Christianity in western Manitoba between 1911 and 1949, used interviews as her primary data source.

Given the institutionalized racism that prevailed in Canada between 1885 and 1947, Marshall claims that references to Chinese immigrants in local histories were either scarce or often dismissed as just “a Chinaman,” as if the settlers did not have much history during their lives in these localities. Marshall argues that this does not represent the Chinese immigrants’ experience, as the Chinese settlers suffered from damaged family relationships and racism in order to survive in a new land and work to create a future. Even just the changing of their names, Marshall notes, can tell us a lot about their histories which have otherwise been silenced, and she writes that “many men had alternate versions of their names, which must have been very frustrating and demeaning for the Chinese immigrants” (Marshall, 2011, p. 17). Marshall thus uses the oral history approach by interviewing people related to the early Chinese settlers, as family members, friends, or colleagues, hoping to uncover silenced voices and reconstruct an otherwise forgotten history.

When the available documents largely tell only one side of a story, oral history can be used to uncover other sides. Kristina Llewellyn (2006), for example, explores gendered democracy in post-war Toronto secondary schools by employing oral histories. While the spaces in such schools were claimed to be constructed as democratic, she argues that actual testimonies from women teachers tell a different story. Viewed and treated as “quasi-citizens and secondary workers” (p. 3), women in fact did not have proper authority in these supposedly democratic institutions, as in the 1950s secondary schools “remained highly patriarchal, centralized, and hierarchical,” according to Llewellyn (p. 2). Traditional gender distinctions were still expected of women teachers in not only the private space, but also the public career space, even though the latter, ironically, claimed to be democratic (Llewellyn, 2006). This blending of oral history with a feminist perspective puts Llewellyn

in a good position to explore the relationship between power and identity among women teachers.

In deciding to use people's recollections of their childhood school experiences to reconstruct what it was like to be at school living under the monolingual policy, the present research finds inspiration in the work of Neil Sutherland (1997). Sutherland relies on the adult memories yielded in interviews as primary data to investigate what childhood meant in Canada to children during the era between the First World War and the widespread adoption of television in the 1960s. The decision to use adult recollections was due to the inaccessibility of children's actual testimonies from that time. While the fallibility of memory is an obvious concern with this approach, Sutherland claims that this is not a problem in his work, since he deals with common childhood experiences rather than attempting to focus on any specific events peculiar to the lives of some children. Besides, children's lives tend to be highly structured, embedded in an everyday routine, and this makes such recollections more accurate. Sutherland, however, identifies a number of other issues about oral history which will be discussed later in this section. For example, he notes that "memory is not only fallible; it is also shaped by the circumstances that prompt it" (1997, p. 5). That is, in describing what happened in the past, we actually do it under the influence of the present, or in Sutherland's words, recollection "...depends on how we currently structure our lives and how we describe, explain, and justify them" (pp. 6-7). To answer this concern, Sutherland responds with support from psychologists, who claim that, "a memory is the reconstruction of what is being recalled rather than the reproduction of it" (p. 7). A memory is thus always the product of the past and present.

Sutherland also notes that no matter how different childhood experiences may be, they share similar scripts, and it is the common patterns displayed across Canada that enable him to generalize and draw on the history of childhood during a specific era (Sutherland, 1997). In a similar vein, inspired by Sutherland, I adopt the recollections of my interviewees of their school days to come up with the common patterns with which I can then generalize and map life under the years of KMT dominance and the Mandarin-only policy.

Oral historians, according to Ritchie (2003), aim at interpreting interviewees' stories in a historical context, turning them into historical records by preserving the narratives of their interviews to "leave as complete, candid, and reliable a record as possible" (p. 24) for future generations--in other words, "availability [of the results] for general research, reinterpretation, and verification defines oral history" (p. 24). In this sense, oral history is different from other approaches, in that studies which use it are often carried out beyond an individual context, in contrast with narrative analysis, which, according to Creswell, aims at capturing "the detailed stories of a single life" (2007a, p. 55), configuring these into a story of personal experiences, and discussing their meaning for the individual (Creswell, 2007a, 2007b; Garson, 2008). The focus of oral history research often goes beyond preserving history at a personal level, as narrative analysis researchers often do, and very often such efforts aim at preserving the accounts of individuals for historical purposes so that the resulting historical records can be stored in archives and institutions (Ritchie, 2003). The fact that oral history emphasizes how individuals' life stories make sense in the wider historical context they exist within means that it can be used to study how an identity evolves in history.

Research based on oral history always employs some form of interviews. In fact, the exchanges that occur between interviewer and interviewees are seen as an essential part of oral history. In this context, the memories and personal accounts of interviewees are the focus of interviews. Simply put, as Ritchie notes, “oral history collects memories and personal commentaries of historical significance through recorded interviews” (2003, p. 20). While it has been widely adopted by multi-disciplinary research since it was first developed as a specific technique in the 1940s (Ritchie, 2003), the knowledge produced with this methodology has also been widely questioned (Halbmayer, 2009), with the main concern, as noted above, being people’s imperfect memories.

As memory fades with time and interviewees’ accounts are always subjective, the accuracy of memory and subjectivity are two potential problems with oral history. Besides, as Tschuggnall argues (as cited in Halbmayer, 2009, p. 196), old memories keep being shaped and reshaped in new contexts, and thus interview stories are, as Welzer notes, “much more closely linked to the real and immediate social situation of the interview than to things one would correlate with historic facts of lives lived” (as cited in Halbmayer 2009, p. 196). It is because “the present circumstances and conditions shape the way the past is narrated” (Stögner, 2009, p. 205). In fact, memory fallibility and subjectivity should not be viewed as fundamental limitations of oral history, according to Ritchie, because this approach “is as reliable or unreliable as other research sources” (2003, p. 26). Moreover, the reliability of memories can be improved with a number of techniques that are familiar to well-trained oral historians, who can help interviewees to produce better quality recollections by giving context and structure to the give-and-take that arises in questioning (Ritchie, 2003). As Steven High (2011) argues, words spoken in memories are not the only thing historians rely

on for the meaning, since

[meaning is also found] in the form and structure of the oral narratives as well as the voice and body. People's relationship to their own stories—where they linger and what they skip over, helps us understand the logic of what we are hearing. (para. 8)

As for subjectivity, which is generally seen as intrinsic and inevitable in social studies, as Richie (2003) asserts, instead of being taken as harming the validity of interview data, it is simply something that researchers need to acknowledge in their work. Portelli (1991, as cited in High, 2011) further argues that subjectivity is what makes interviews different from other forms of data, and is in fact one of their strengths, as it is in people's subjective narratives of their own lives that oral historians find a great deal of meaning. In addition, as Sutherland (1997) notes, memories are similar to other historical sources, such as the description of a car accident that people give to a police officer, which people mistakenly tend to see as objective.

With regard to this concern about how the "purity" of memories is affected by the present, similar to Sutherland's view of seeing both the present and past as part of the nature of memory itself, Benjamin argues for an approach that represents "the past in our space, not us in the realm of the past" (as cited in Stögner, 2009, p. 207). In this, he recognizes the undesirability of trying to look at the past the way it really was, and instead claims that the past should be looked at in the way it is represented now (as cited in Stögner, 2009, p. 207). Likewise, Stögner (2009) urges that the views given by interviewees be seen as "personal/biographical truth" or, in his terms, "the truth of memory," which bears the influence of the present on the past.

In this study, it is focus groups rather than individual interviews that are adopted to carry out the oral history approach. Focus group interviews, like other forms of interviews, offer in-depth understanding of the participants' views through intensive and direct encounters with them (Edmunds, 2000; Vaughn, Schumm, and Sinagub, 1996). The organized, dynamic group discussions adopted in this approach are not aimed at generating consensus among participants, and as a result, they "do not generate quantitative information that can be projected to a larger population" (Vaughn, et al., 1996, p. 5). Instead, finding and presenting different voices and the truth these represent is the main aim. Rajan (2011), for example, probes the problem of violence against women with disabilities. Through the use of small focus groups to obtain the minority women's voices which are otherwise often unheard, she found that the abuse is perpetuated not only domestically, but also in the system that aims to care for them. The support offered in the small groups used in this earlier study encourages the participants to speak more candidly and freely, and thus findings of depth and multiple dimensions can be obtained, and strategies preventing violence can be developed based on them.

However, focus group interviews are also criticized on a number of grounds, including the lack of generalizability of the related findings, the heavy dependence on the moderator for the quality of the interviews (Vaughn, et al., 1996), and the possibility that participants' responses are actually the product of the context of a group's discussion, and are thus not independent (Edmunds, 2000).

Despite these limitations, as I will discuss in the section on focus group interviews below, this study adopts focus groups over individual interviews in order to obtain oral histories from people who went through the same history. In the next section, which



presents the rationale for the research design, the advantages of the focus group interviews will be discussed in detail.

### **Critical Discourse Analysis**

In addition to adopting oral history as the primary methodology to guide the focus group interviews, I also adopt Critical Discourse Analysis (CDA) to guide the analysis of texts yielded by public documents and interview data. CDA is deeply grounded in Foucault's concept of "discourse," which informs every aspect of the social world, so much so that social interactions cannot be fully understood without reference to the discourses that give them meaning. Based on these tenets, CDA aims to understand the knowledge, identity, and power relations that define society by the use of written and spoken texts (McGregor, 2004). Van Dijk (2001) defines CDA as "a type of discourse analytical research that primarily studies the way social power abuse, dominance, and inequality are enacted, reproduced, and resisted by text and talk in the social and political context" (p. 352). CDA, in other words, studies how socially dominant discourse produces social inequality and domination through text and writing, with van Dijk focusing on the issue of racism (van Dijk, 1993, 2000, 2006). According to Edgar and Sedgwick (2002), Gutting (2005), and Scheurich and McKenzie (2005), Foucault problematizes the idea that modernity creates knowledge in a seemingly rational and logical manner. These forms of normalized, dominant knowledge manifest themselves in everyday discourses, enabling the processes of regulation and marginalization to build power and hegemony, and thus they need to be unmasked and challenged in order to help the victims of oppression to resist hegemony and transform their lives (McGregor, 2004). In this respect, CDA explicitly manifests an epistemological stance that is highly critical and political.

In conducting CDA, researchers first look at a text as a whole, approach it with a critical eye, and try to find out what perspective is being presented in it (McGregor, 2004). They then move onto the more minute levels of analyzing sentences, phrases and words, focusing on semantic constructions, rhetorical configurations, choices of words and tone, all of which can imply positive or negative evaluations (van Dijk, 1993). CDA then often situates these discursive practices in social, economic, political and historical contexts to understand how they are initiated, reproduced, mediated and maintained (van Dijk, 1988). Based on this, Fairclough (2000, as cited in McGregor, 2004) argues that CDA works to determine the relationship between three levels of analysis: the actual text, the discursive practices, and the larger social context that produces both text and these practices.

CDA sees texts as means for social control, in that managing the mind of others through control of knowledge is essentially a function of both text and talk (van Dijk, 1993). Simply put, CDA is a critical approach to discourse that seeks to find the power relations and social domination embedded in public spaces (McGregor, 2004). As such, media texts like reports from newspapers or TV are the commonest sources of information for CDA. Van Dijk, for example, analyzes news reports as forms of political or elite discourse that create knowledge and perpetuate racism (van Dijk, 2000; 2006). Besides news, CDA may also work on semi-public spheres, like textbooks, as seen in Montgomery (2005a; 2005b), who uses CDA to analyze the racism embedded in Canadian history textbooks. In some examples of CDA, analysts investigate popular and neutralized discourses which are constructed and perpetuated by discursive practices. For example, using information obtained from class discussions, Roman and Stanley (1997) analyse how young students understood some popular and official discourses, such as anti-racism and nationalism.

Seeing the discourse of “ethnicity” as contested based on the black experience in British culture, Hall (1992) challenges the old politics of representation, in which “old ethnicity,” in his term, is often equivalent to “nationalism, imperialism, racism, and the state” (p. 257). He thus proposes a “new ethnicity” that includes “diversity” and “difference,” and is “a positive conception of the ethnicity of the margins, of the periphery” (p. 258). In a similar fashion, by locating the discourse of multiculturalism in a social and historical context, Giroux (1997) uses CDA to challenge it, and proposes instead the concept of an “insurgent multiculturalism.” Taking an anti-essentialist’s perspective, Billig (1995) employs CDA to analyze how newspaper narratives, on a daily basis, disseminate and sustain nationalism and create a nationalistic discourse.

With a focus on the ways social and political domination and inequality are reproduced by texts, CDA is both an effective explanation and critique of the ways dominant discourses influence socially shared knowledge, attitudes and ideologies (van Dijk, 1993). It also provides a way to study how dominance can be enacted and reproduced by subtle, everyday forms of texts that appear natural and unproblematic. It is in this way that CDA theoretically guides the present research in using public documents, including newspapers and education journals, as supporting data to study the discourse of Mandarinization.

As mentioned in Chapter 1, this research involves the Taiwanese interviewees telling their stories of school life under Japanese and KMT rule, which are then interpreted and seen in the historical context, as without this oral accounts can become meaningless, thus obscuring the process of identity formation. Therefore, both oral history and CDA are

appropriate methods that can help achieve this study's aim of examining the formation of a Taiwanese identity in a specific historical context.

## **Research Design**

### **Rationale for the Research Design**

Previous studies on nationalism and language, and on their effects on the formation of identity, tend to be theoretically-driven, as shown in the literature review (see for example, Anderson, 2006; Fishman, 1972; Smith, 1971). This research obtains empirical evidence based on how people experienced and lived language and nationalism, and how these events ultimately shaped their sense of identity. This work adopts two data sources—public documents from newspapers and educational journals and oral histories from focus group interviews. The former are used to construct a picture of the official discourse that informed the policy of Mandarinization and Sinification. Public document analysis serves as the background research and supports the primary method, oral history. The latter data source, focus group interviews, revisits people's elementary school experiences to learn how they actually lived the Mandarin-only policy, the economic and class differences in society, as well as the construction of Waisheng and Mandarin dominance. Together, the two methods are used to explore the formation of Taiwanese identity within the context of Mandarin dominance and KMT hegemony. The rationale for adopting these two methods is explained in more detail below.

#### **Document analysis.**

As mentioned in Chapter 2, standardization of language has often been used as a high road to national solidarity, due to the “natural” link between language and nationalism. The

media has an indispensable role to play in perpetuating this link to support the nationalistic mission, as people need to be reminded of this all the time, so that their national identity is not forgotten (Billig, 1995). In Foucault's terms, media representations are discursive formations where nationalistic knowledge is produced (Foucault, 1972). As such, not only are there flaggings of national symbols everywhere in people's daily lives, but there are also flaggings such as a deixis of little words in the media, "the," "we," and "they," for example, to ensure that a nationalist identity develops. According to Billig (1995), the media and its banal nationalism markers, the deixis, are key tools that support the sustainability of the nation-state. In the Mandarin-only policy era, representations from newspapers created the Mandarinization discourse that sustained the KMT's legitimacy and dominance, and this is the reason why newspapers are used to study this discourse. As for the education journals, they are adopted in this work because the Mandarin-only policy was a language-in-education policy, whose enforcement mainly affected school children and teachers. As such, discussions about this policy would appear in these journals, which provided another space, besides newspapers, where the general public and those who actually carried out the policy could comment on it. The use of education journals is also inspired by the work of Glen Peterson (1997), who notes that in his project to reconstruct the literacy movement in Guangdong, China, between 1949 and 1995, provincial education journals were very helpful in presenting both official debates and practical problems at the local level, which were normally absent from the official discourses presented in the national sources.

### **Focus group interviews.**

As mentioned above, both language and nation-state are imagined and created, but in a way that makes them seem to exist in the world naturally and unproblematically. However,

in reality, in everyday life, how do people live the linkage between these two imagined products and the hegemonic forces that create this link? To answer this question, this research adopts focus group interviews to revisit people's elementary school experiences to know how they actually lived the Mandarin-only policy, the ethnic and class differences that prevailed in society in those days, as well as the strongly enforced sense of Chinese nationalism, all of which are ultimately linked to the construction of Taiwanese identity. As mentioned in Chapter 2, we need to consider three dimensions when exploring identity construction—what individuals inherit from their ancestry, what historical and social contexts shape them, and how much they do to adapt to the environment. Interviews are a direct, flexible, and subject-expressive way (as compared to questionnaires) of getting first-hand information about how people negotiate their identity (Marcia, 2007). The voices and stories of the interviewees can help us conceptualize the meaning of becoming Taiwanese.

The choice of interviews as the primary technique is also based on the fact that in the era of a monolingual policy and martial law, with rigid restrictions on publication and speech, the contemporary documents that are available on politically-laden topics, such as the linkage between vernacular languages and ethnic/ national identification, were always very one-sided, with dissenting voices not allowed to be heard. We thus have mostly biased official histories with blind spots. A clear rationale offered by Vaughn et al. (1996) is that interviews are “particularly useful when there is a lack of reliable and valid measures for obtaining information on the selected topics” (p. 20). For this reason, they are used in the present research as the primary source for studying the formation of Taiwanese identity during the Mandarin-only era.

Focus group interviews are especially useful, in that the interactions that can occur among interviewees with similar life experiences can lead to better information being provided (Creswell, 2007a, 2008). In fact, not only the interactions between the respondents, but also those between the moderator and respondents, add to the depth of the knowledge explored. Under the condition that interviewees are encouraged to respond freely and not required to answer every question, as Schoenfeld maintains (as cited in Vaughn et al., 1996, p. 19), “the responses that are made may be more genuine and substantial.” In addition, I also adopted focus group interviews, instead of individual ones, for the following reasons. First, before the interviews were done in Taiwan, I did four test interviews in Canada on Taiwanese Canadians who had experienced the Mandarin-only policy when they were children. Three of the test interviews were group interviews, while one was an individual interview. In my observation, the interactions among interviewees did lead to more memories being discussed than when the interview was done with one person alone, and the overlapping life experiences of the multiple interviewees were able to inspire the respondents to recall things in more detail. Part of the reason is that, as Vaughn et al. (1996) argue, interactions with others in the focus group interview facilitate individuals to form more opinions about the topic under discussion. Second, as the interviews involved recalling such topics as the White Terror, which used to be taboo and dangerous to discuss, focus group interviews were deemed more appropriate as they often yield a greater sense of comfort and security that will elicit more candid and reflective responses. The ambiance of group dynamics offers support for individuals and thus “enhance the likelihood that people will speak frankly about a subject, and these cannot occur through individual interviews” (Vaughn et al., 1996, p. 7). In addition, due to my snowball recruitment process,

participants in the same focus group interviews generally had some kind of relationship—husband and wife, family members, or acquaintances, and this eased the tension and discomfort that may otherwise have arisen when talking about sensitive and once forbidden topics. Third, Kraus’ insight on accessing identity development through qualitative study also informed my decision to employ focus group interviews. Kraus argues that the narratives of participants about identities are not just about talking, but also about what they are doing, as much of identity is revealed through “the performative side of interaction” (Kraus, 2007, p. 35). This “performative side of interaction” is what makes focus groups a better choice than individual interviews.

With all the advantages of adopting focus groups over individual ones given above, one thing, however, should be noted as a potential limitation. While the relationship between respondents can facilitate an informal ambiance to inspire participation, it is also likely that the design generates gendered focus groups. As contended by Krueger, some opinions can be “formed with the direct or indirect input of others” (as cited in Vaughn et al., 1996, p. 20), and in mixed gender interviews it is possible that men will dominate and affect how women present their stories. Gender issues are not a main focus of the discussions of this study, but this does not mean that gender is not recognized as significant in this thesis. Therefore, in Chapters 4-7, the gender differences reflected and not reflected in the men and women participants’ responses will be noted.

## **Two Types of Data Sources, Data Collecting and Analyzing**

### **Public documents.**

The documents reviewed in the present research include selected newspapers and



education journals. More specifically, the data comes from three sources: (1) selected newspapers published between 1945 and 1987, (2) one-day newspaper surveys, and (3) education journals published between 1945 and 1987. The purpose of this analysis is to study the role of printed materials in informing the discourses of Mandarinization and Waisheng superiority that were used to sustain KMT hegemony. Information about each source and how the data are collected are given below in the tables and notes.

For all three sources, based on the three stages of the era under discussion—i.e., early KMT rule, the period when hegemony was being constructed, and the era after hegemony was fully established—I conducted either a keyword search (for sources 1 and 3) or browsed whole newspapers (for source 2) to obtain articles. The full contents of the articles that were chosen in this way were then reviewed. In analyzing each text, I sorted out the important points being discussed, compared these for all the articles in the same time period, and then identified the primary themes related to the present project for each of these. That is, I looked to the general patterns displayed in the texts of each period to construct an overall picture of the greater discourse. By revealing the prescribed knowledge at each stage of the construction of hegemony, my aim was to uncover the flow of the discourses being constructed.

When doing data analysis, a critical lens is adopted, with Foucault's view of "discourse" as the focus. In the texts I probed how language and representations in printed media produced knowledge about things and people, and how they controlled the ways experiences are talked or not talked about. I looked for what forms of knowledge were created, as well as what knowledge was silenced. Depending on different periods, the forms of knowledge

produced are slightly different, as will be discussed in more detail in the following chapters. However, the results generally confirm that the newspapers and journals examined in this work perpetuated discourses that viewed Mandarin as the stepping stone to nationalism, the KMT as the legitimate guardian of Chinese identity, Chineseness/ Waisheng-ness as superior, and Taiwanese-ness/ Bensheng-ness as inferior, while at the same time they silenced any knowledge that questioned these positions or suggested that they were problematic.

***Newspapers published between 1945 and 1987.***

Table 3-1 shows how the data are collected from four newspapers that were published during the period 1945-1987. Among these, the review of *Central Daily News*, *United Daily News*, and *China Times*, was done via their online database and keyword searches that yielded full texts. As for *Taiwan Xin Sheng Daily News*, which does not have an online database, the review was done via the microfilms available in the National Central Library, and the review period was from 1945 to 1949. Full texts for review were obtained by browsing the titles for keywords. For all four newspapers, after the keyword search was completed, photocopies of the related articles were obtained from the National Central Library, and the number of full texts analyzed is given in the table. A full list of the keywords used to search the database is given in Table 3-1-1. Among the full texts reviewed in this work, a list of those that I reference is merged alphabetically into the references at the end of this thesis.

**Table 3-1 Data Collected from Four Newspapers**

Name of newspaper	Form of data source	Reviewed period	In-circulation from ~	Data collected by ~	No. of full texts reviewed	Notes
<i>Taiwan Xin Sheng Daily News</i>	Micro-film	1945/10/25~ 1949/12/31	1945/10/25~ today	Browsing whole newspapers looking for keywords in the titles and texts	51	*1
<i>Central Daily News</i>	<i>Central Daily News</i> (online database)	1945~ 1987	1928~ 2006 (1928~ 1949: in Shanghai; 1949~ 2006: in Taiwan)	Keyword search	25	*2
<i>United Daily News</i>	<i>United Daily News</i> (online database)	1951~ 1987	1951~ today	Keyword search	13	*3
<i>China Times</i>	<i>China Times</i> (online database)	1950~ 1987	1950 ~ today	Keyword search	5	*4 *5

Notes:

\*1 *Taiwan Xin Sheng Daily News* was launched on 1945/10/25 (“Guanyu Taiwan xin sheng bao [history of Taiwan Xin Sheng Daily News],” n.d.). At first three-fourths of the newspaper was in Chinese, and one-fourth in Japanese, and soon the latter was

abolished.

- \*2 *Central Daily News* was first published in Shanghai in 1928 (“Zhong yang ribao [Central Daily News],” n.d.). With the retreat of the KMT to Taiwan, several members of the cultural elite from the Mainland continued to run the newspaper in Taiwan after 1949. Due to this background, it has long been seen as a voice for the KMT, and is regarded as part of the KMT’s media machine.
- \*3 *United Daily News*, launched in 1951 (“Lian he bao [United Daily News],” n.d.) takes a pan-blue, pro-China, and conservative political stance.
- \*4 *China Times*, launched in 1960 (“Zhong guo shibao [China Times],” n.d.), takes a more liberal stance, as compared to *Central Daily News* and *United Daily News*.
- \*5 Before 1968, the newspaper was called *Zheng Xin News*.

**Table 3-1-1 Keyword Search**

Newspaper database	Key words used for the search
<i>Taiwan Xin Sheng Daily News (microfilm)</i>	guangfu [the Retrocession], guoyu [Mandarin], taiwan hua [Taiyu], fangyan [dialect], riben hua [Japanese], yuyan [language], Jiaoyu [education].
<i>Central Daily News (online database)</i>	
<i>United Daily News (online database)</i>	
<i>China Times (online database)</i>	

### *One-day newspaper survey.*

The second data source is a one-day newspaper survey, which is conducted on all available newspapers for certain dates. Inspired by Billig (1995), who conducted a survey of British newspapers that were published on a randomly selected day to study the perpetuation of banal nationalism, my survey studies how printed media makes use of certain significant occasions to perpetuate the nationalistic discourse of Mandarin and becoming Chinese. Unlike the first source, which studies the knowledge produced by newspapers on a daily basis, the second specifically explores what is produced around important events. The rationale for adopting this source is that the state apparatus often wants to take advantage of certain occasions to remind people of the concept and ideals of nationhood. I thus choose several dates around significant events to focus on, which include: (1) a random date after the announcement of the defeat of the Japanese on 1945/08/14, (2) two random dates before the Retrocession<sup>4</sup> on 1945/10/25, (3) Retrocession Day itself, (4) a random date shortly after this, (5) a random date shortly after the 228 Incident on 1947/02/28, (6) two dates, one ROC national day and the other PRC national day, between the 228 Incident and the lifting of martial law on 1987/07/15, and (7) an ROC national day shortly after the lifting of martial law.

Table 3-2 shows details of the newspapers surveyed for each date, including the form of the source, how data were collected, and the results of the survey. In this survey, I carried out a full-content browse to obtain articles for analysis. Based on the aims of the survey,

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<sup>4</sup> Under Japanese colonial rule, from 1895 to 1945, Taiwanese people suffered from discrimination. With the announcement of Japan's unconditional surrender at the end of World War II, Taiwan was returned to the ROC on August 14, 1945. Japanese colonial rule officially ended on October 25, 1945, when a ceremony was held in Taipei in celebration of the restoration of freedom. In memory of the takeover, October 25, 1945 was designated as the Retrocession Day ("Taiwan's Retrocession Day," 2012).

my articles of interest go beyond the keywords that are used in the keyword search for the first source, shown in Table 3-1-1, and include other words such as guojia [the state] and fangong [anti-Communism], with the full list shown in Table 3-2-1. Photocopies of the secured texts were obtained from the National Central Library for analysis, and the number of full texts analyzed is given in the table. As with the first data source, a list of the items that I referenced is merged alphabetically into the references at the end of the thesis.

**Table 3-2 One-day Newspaper Survey**

Date surveyed	Newspaper surveyed	Type of source	Data collected by ~	No. of full articles reviewed	Notes
1945/08/16	<i>Central Daily News</i>	Hard copies	Whole newspaper browse	2	*1
1945/09/10	<i>Central Daily News</i>	Hard copies	Whole newspaper browse	3	*2
1945/10/10	<i>Central Daily News</i>	Hard copies	Whole newspaper browse	5	*3
1945/10/25	<i>Central Daily News</i>	Hard copies	Whole newspaper browse	4	
	<i>Taiwan Xin Sheng Daily News</i>			5	*4 *5

1945/11/10	<i>Central Daily News</i>	Hard copies	Whole newspaper browse	3		
	<i>Taiwan Xin Sheng Daily News</i>			4		
1947/03/02	<i>Central Daily News</i>	Hard copies	Whole newspaper browse	4	*6	
	<i>Taiwan Xin Sheng Daily News</i>			3		
	<i>China Daily News</i>			7	*7	
1955/10/10	<i>Central Daily News</i>	Hard copies	Whole newspaper browse	5		
	<i>Taiwan Xin Sheng Daily News</i>			10		
	<i>China Daily News</i>			7		
	<i>United Daily News</i>			3		
	<i>Zheng Xin News</i>			5		*8
	<i>Keng Shen Daily News</i>			1		*9
1966/10/01	<i>Central Daily News</i>	Hard copies	Whole newspaper browse	3	*10	
	<i>China Daily News</i>			9		

	<i>Taiwan Xin Sheng Daily News</i>			6	
	<i>United Daily News</i>			5	
	<i>Taiwan News</i>			7	*11
	<i>Zheng Xin News</i>			10	
1987/10/10	<i>Central Daily News</i>	Hard copies	Whole newspaper browse	8	
	<i>Taiwan Xin Sheng Daily News</i>			6	
	<i>China Daily News</i>			1	
	<i>United Daily News</i>			5	
	<i>Taiwan News</i>			1	
	<i>China Times</i>			1	
	<i>Min Sheng News</i>			3	*12
	<i>Keng Shen Daily News</i>			1	*13

Notes:

\*1 In addition to the two texts examined in this study, the whole newspaper focuses on the announcement of the defeat of Japan.



- \*2 In addition to the three texts, the whole newspaper focuses on the ceremony marking the ROC's takeover of Taiwan.
- \*3 This was the first National Day (October 10) after the surrender of Japan. One of the texts talks about the birth of the ROC in 1911 in Mainland China.
- \*4 Three of the articles are about the arrival of the new administrator of Taiwan, Chen- Yi. One article is Chen Yi's "Announcement to Taiwanese Tongbao [fellow countrymen]".
- \*5 *Taiwan Xin Sheng Daily News* is launched on this day. There is an announcement which reports the launch of the newspaper and the beginning of a new phase in Taiwan's history.
- \*6 *Central Daily News* did not publish any articles about the 228 Incident on this date, in contrast to the other two newspapers, which had many of them.
- \*7 *China Daily News* in particular published many reports about the Incident, and included an extra page issued in the afternoon edition that added updates. Launched on February 20, 1946, it was owned by the KMT ("Zhong hua ribao [China Daily News]," n.d.) and published in southern Taiwan.
- \*8 *Zheng Xin News* changed its name to "China Times" in 1968 ("Zhong guo shibao [China Times]," n.d.).
- \*9 *Keng Shen Daily News* was published in eastern Taiwan, and was launched in 1947 ("Guanyu keng shen ribao [History of Keng Shen Daily News]," n.d.).
- \*10 This is the National Day of the Communist PRC, and all of the newspapers had articles about the recent "returning" of three martyrs from the mainland.
- \*11 *Taiwan News* was launched in 1961("Taiwan xin wen bao jianjie [Brief history of Taiwan News]," n.d.), and published in southern Taiwan.

- \*12 Only in existence between 1978 and 2006, *Min Sheng News* was published in Taipei, the capital of the ROC, and was affiliated with the *United Daily News* (“Min sheng bao [Min Sheng News],” n.d.).
- \*13 The article advocates speaking Mandarin instead of dialects. It criticizes two provincial councilors who used Taiyu at assemblies in 1977.

**Table 3-2-1 Keyword Search**

Keywords used for the search
<p>guangfu [the Retrocession], guojia [nation- state],  tongbao [fellow countrymen], minzu yishi [ethnic consciousness],  guoyu [Mandarin], taiwan hua [Taiyu], fangyan [dialect],  riben [Japan], riben hua [Japanese], wenhua [culture],  jiaoyu [education], shengji [Bensheng/ Waisheng],  chaqi siyan shijian [the 228 Incident], zuguo [fatherland],  tuanjie [solidarity], fangong [anti-Communism]</p>

***Education journals published between 1945 and 1987.***

Using keywords more focused on education and language teaching (see Table 3-3-1), I searched an online database (Index to Taiwan Periodical Literature System) and found 32 articles from nine journals for full-text analysis. After the keyword search was completed, hard copies of the search results were obtained from National Central Library and the libraries of several major universities, including National Chengkung University, National Taiwan Normal University, and National University of Tainan, for review.

Table 3-3 shows details of this search. As with the above two sources, among the reviewed full texts, a list of those that I referenced is merged alphabetically into the

references at the end of the thesis.

**Table 3-3 Education Journals**

Name of source	Type of source	Review period	Data collected by ~	No. of articles reviewed
<i>Index to Taiwan periodical literature system</i>	Online database	1945~ 1987	keyword search	32

**Table 3-3-1 Keyword Search**

Education journal database	Key words used for the search
<i>Index to Taiwan Periodical Literature System (online database)</i>	guoyu [Mandarin], taiwan hua [Taiyu], fangyan [dialect], yuyan [language], jiaoyu [education], riben [Japan], wenhua [culture], tuanjie [solidarity]

**Focus group interviews.**

A total of 28 participants gave their consent to join this research. They were organized into 12 focus group interviews, which were conducted in Taiwan during September and October 2010. These were carried out to obtain empirical evidence regarding people's school experiences under different stages of KMT's construction of hegemony, and how these shaped their views of Taiyu and Taiwaneseess.

***Participants and recruitment.***

This research recruited participants who experienced either a Japanese education or the Mandarin-only policy, or both, between the mid-1940s and 1987, during their elementary school years. The 28 participants were born between 1930 and 1965, with 14 males and 14 females. Based on my interest in studying people's experience of living under different

stages of hegemonic construction, the participants are divided into four groups (Japanese rule/ Japanese group, early KMT rule/ early-KMT group—1945-1949, establishing the hegemony of Mandarin/ mid-KMT group—1949-1958, after KMT hegemony was fully established/ peak-KMT group—1959-1987), with several of them overlapping in two adjacent stages, as they had experienced both of them. Table 3-4 shows the interviewees' details, including their pseudonyms, gender and birth year, as well as the four categories.

**Table 3-4 Participant Information by Stages**

Category		Pseudonym	Gender	Birth Year
Japanese rule (Japanese group)	Early KMT rule 1945-1949 (Early-KMT group)	<i>Mishi</i>	M	1930
		<i>Tamu</i>	M	1931
		<i>Yinno</i>	F	1934
		<i>Yochi</i>	M	1935
		<i>Shinn</i>	M	1936
		<i>Daisy</i>	F	1936
		<i>Wong</i>	M	1937
Establishing the hegemony of Mandarin 1949-1958 (Mid-KMT group)	After KMT hegemony was fully established (Peak- KMT group)	<i>Yo</i>	F	1940
		<i>Manny</i>	F	1940
		<i>Ji</i>	M	1943
		<i>Grace</i>	F	1944
		<i>Beam</i>	M	1944
		<i>Shine</i>	F	1945
		<i>Wes</i>	M	1945
		<i>Mona</i>	F	1945
		<i>Yue</i>	F	1945
		<i>Chen</i>	M	1947
		<i>Sam</i>	M	1950
		<i>Leaf</i>	F	1950
		<i>Lily</i>	F	1953
<i>Jo</i>	M	1956		
<i>Finn</i>	F	1957		
<i>Benny</i>	M	1959		
<i>Penny</i>	F	1962		
<i>Jen</i>	F	1963		
<i>Mont</i>	M	1963		
<i>Jim</i>	M	1964		
<i>Ali</i>	F	1965		

All the participants were recruited through snowball sampling, starting with the parents of one of my acquaintances and teachers from my elementary school days. Participants joining the same focus group session already knew each other—being either husband and wife, family members, or acquaintances. None of the participants had supervisory or trust-based relationships with me. For those recruited by my initial contacts, the contact first asked if they were interested in joining the research as a group, and if they were, I then contacted them by phone. In the telephone conversation, I gave them a brief introduction of the project, what their roles would be in the research, and how the interviews would be processed. If they decided to participate, I then set up an appointment for the interview and confirmed with them about who would be in the same focus group interview. I also told them that a written consent form for their participation in the research would be given to them on the day of the interview. The recruitment of the participants, as well as the conduct of the interviews, followed the ethical guidelines contained in the Tri-Council Policy Statement (Canadian Institutes of Health Research, 2010), which applied to research with human participants. A copy of the participant recruitment notice with its Chinese translation, and a copy of participant consent form with its Chinese translation, are appended at the end of the thesis (Appendices B and C).

All the participants were recruited from Urban #1, a medium-sized city in southern Taiwan. This location was chosen for its accessibility to me, as well as for the convenience of organizing and conducting interviews. Since one of the aims of the project is to study the meaning of Taiwanese identity and Taiyu, the criteria for selecting participants is that Taiyu is the participants' or their parents' home language. Based on snowball recruitment, all of the participants were members of the middle class, who had at least completed their

high school education. Full details of the participants, including where they grew up, family background, education, and occupation, including the language(s) they used in the interviews, are given separately in Chapters 4 to 7. However, tables listing details of all the 28 participants are given in Appendix D.

***Interview organization and process.***

The number of participants joining each focus group varied from two to four, different from typical focus groups of six to ten interviewees (Edmunds, 2000; Rajan, 2011). I purposely organized small groups, because with a small sample the interactions would be easier for me to observe and record. In addition, in-depth focus groups were also desirable because in these the participants have more chances to speak. Most of the focus group interview sessions were mix-gendered, and each lasted between two and three hours. The interviews were conducted either in the participants' homes or a public place, based on the participants' preferences. I began each interview by describing the project and the interview process, and answering their questions about participation. I also explained how the collected data would be processed and stored. I assured them that I would protect their confidentiality, and that any identifying information would be anonymized through the use of pseudonyms and fictitious place names. Interviews were then conducted in either Mandarin or Taiyu, or both, depending on the preference of the interviewees. The focus group sessions were digitally recorded, with the interviewees' permission. After the focus group sessions, there were two follow-up individual interviews conducted by telephone for clarification of the information provided in them. Each of the follow-up interviews lasted about 30 minutes, and they were also audio recorded.

The transcription of the interview data was done in Chinese immediately after each interview took place. I then read and annotated each transcript at least two times in order to identify the points related to the project. As with the document analysis, CDA guided the interview data analysis.

Table 3-5 shows the composition of the 12 focus groups and the two follow-up telephone interviews, as well as the dates of the interviews.

**Table 3-5 Focus Group/ Telephone Follow-up Interviews by Interview Date**

Focus group #	Interview date	Participants and birth year
1	September 27, 2010	<i>Yochi</i> (1935); <i>Wong</i> (1937)
2	September 29, 2010	<i>Benny</i> (1959); <i>Jen</i> (1963)
3	September 30, 2010	<i>Shinn</i> (1936); <i>Yo</i> (1940); <i>Ji</i> (1943)
4	September 30, 2010	<i>Sam</i> (1950); <i>Lily</i> (1953); <i>Ali</i> (1965)
5	October 2, 2010	<i>Chen</i> (1947); <i>Leaf</i> (1950)
6	October 2, 2010	<i>Mont</i> (1963); <i>Penny</i> (1962)
7	October 3, 2010	<i>Grace</i> (1944); <i>Shine</i> (1945)
8	October 4, 2010	<i>Tamu</i> (1931); <i>Yinno</i> (1934); <i>Daisy</i> (1936); <i>Jim</i> (1964)
9	October 4, 2010	<i>Beam</i> (1944); <i>Yue</i> (1945)
10	October 5, 2010	<i>Wes</i> (1945); <i>Mona</i> (1945)
11	October 9, 2010	<i>Jo</i> (1956); <i>Finn</i> (1957)
12	October 21, 2010	<i>Mishi</i> (1930); <i>Manny</i> (1940)
Follow-up Interviews	December 4, 2010	<i>Yinno</i> (1934)
	December 6, 2010	<i>Tamu</i> (1931)

***Interview questions.***

The interview questions were open-ended ones. The interviewees were asked to respond to questions categorized into six categories—(1) questions about past school



experiences, (2) questions about past experience of learning/ speaking languages, (3) questions about national identification, (4) questions about living nationalism in daily life, (5) questions about past experience of teaching Mandarin, if they are retired elementary school teachers, and (6) questions about newspaper representations of the National Language Movement. Interview questions in Chinese and English are appended at the end of the thesis (Appendix E).

In the following chapters (4 to 7), I will present the research findings drawn from the public documents and focus group interviews. Each of the chapters is devoted to a different age cohort—the Japanese group (those growing up under Japanese rule), the early-KMT group (those growing up during the early KMT years), the mid-KMT group (those growing up when the KMT and Mandarin hegemony was being established), and the peak-KMT group (those growing up after the full establishment of this hegemony). Together, these interviews can produce a picture of what school life was like during the different stages of the construction of hegemony in Taiwan.

## Chapter 4 Under Japanese rule—Language and education

This chapter examines the experiences of people who went to school during the era of Japanese rule, starting in the 1930s and lasting until 1945. Divided into three parts, it starts with a brief introduction of Taiwan under Qing rule, before the start of Japanese rule. This is followed by an overview of the socio-political environment of the Japanese era, with a focus on its language and education system. The last part of the chapter is about people’s memories of living through the colonial system, including the social order, language policy and education. The conclusion section then deals with how the construction of hegemony during the Japanese era, particularly via the language policy and education system, informed the participants’ struggle between different national identities.

### About the Participants

Pseudonym	Gender	Birth Year	Occupation	Growing-up Place	Family Background	Highest Education	Language Used in Interview	Focus Group #
Mishi	M	1930	elementary school teacher	Urban #1	merchant	teachers’ college	Mandarin + Taiyu	#12
Tamu	M	1931	university teacher	Urban #1	farmers	graduate school	Taiyu	#8
Yinno	F	1934	homemaker	Urban #1	unknown	high school	Taiyu	#8
Yochi	M	1935	elementary school teacher	Rural #2	farmers	teachers’ college	Mandarin + Taiyu	#1

Shinn	M	1936	business owner	Suburban #1	farmers	vocational high school	Taiyu	#3
Daisy	F	1936	homemaker	Urban #1	unknown	university	Taiyu	#8
Wong	M	1937	merchant	Rural #2	farmers	vocational high school	Mandarin + Taiyu	#1

Seven of the twenty-eight participants, five males and two females, had experiences of going to school under Japanese rule (see Table 3-4), and four focus group interviews were conducted with these individuals, who were joined by participants of other age groups. Of these, *Mishi*, born in 1930, is the oldest. He grew up in Urban #1 in a merchant's family, with his father settling and doing business in Shanghai during the Second World War. Although *Mishi* received a Japanese education, because of his father he spoke some Mandarin before going to teacher's college in 1944. During the interview, he used half Mandarin and half Taiyu. *Tamu*, *Yinno*, and *Daisy* are all from the same family, and joined the same focus group interview. *Tamu*, who also grew up in Urban #1, was born in 1931. His father was a farmer, and he himself was a retired university teacher. During the interview, *Tamu* used mostly Taiyu, and mixed it with a few Japanese terms. *Yinno*, *Tamu*'s wife, also grew up in the same urban area. Born in 1934, she also received several years of Japanese education, up to Grade 4. During the interview, she used mostly Taiyu. *Yinno*'s sister, *Daisy*, was born in 1936, and like *Yinno*, was also a homemaker, although she received a university education. *Daisy* used Taiyu throughout the interview. *Yochi*, born in 1935 in Rural #2, came from a farmer's family, and received a Japanese education for

about three years. A retired elementary school teacher, he used more Mandarin than Taiyu in the interview. *Wong*, a storekeeper born in 1937, also in Rural #2, joined the same focus group interview as *Yochi*. Coming from a farmer's family, *Wong* received one year of Japanese education, and started learning Mandarin after that. He went to a vocational high school after his elementary education. *Shinn* was born in 1936 in Suburban #1. After two years of Japanese education, he began learning Mandarin. *Shinn* was from a farmer's family, with a vocational high school being the highest level of his education. A business owner by occupation, *Shinn* used only Taiyu in the focus group interview, in which he was joined by *Yo* and *Ji*, from the early- and the mid-KMT groups, respectively.

### **Qing Control**

Before Japanese colonial rule, Taiwan was nominally under the jurisdiction of the Qing Dynasty, starting from the Emperor Kang Xi's annexation of Taiwan in 1683, until the cession of Taiwan to Japan in 1895. In the eyes of the Qing, Taiwan was insignificant, "the size of a pellet," "a ball of mud," the taking or abandoning of which did not make any difference to the breadth of the empire (as cited in Davison, 2003, p. 23). Indeed for much of the period, Taiwan was only a prefecture of Fujian province, only becoming a province in its own right in 1885.

With this mindset, the Qing did not make much effort in the administration of Taiwan, which actually started with the establishment of three "Xian [district]" in 1684. The three administrative divisions, along with the capital of Tainan "Fu [prefecture]", were all located in south-western Taiwan, as this was where most of the early migrants settled. Not until 1723 did the official development of central and northern Taiwan begin (F. Huang, 2003).

The Qing authorities applied strict laws to restrict immigration to Taiwan, and by 1682, there were only about 7,000 Han Chinese on the island. The policy was not eased until after 1760, which caused the Han Chinese population to rise to around two million by 1811, many of whom came from Fujian. Han Chinese mostly settled in the plains on the west of the island, gathering around the administrative divisions. There were also those who emigrated before the immigration policy eased, such as the Hakka Chinese, whose large-scale immigration can be traced back to the Kangxi years (1654-1722). They mainly settled the hilly areas in central-northern and southern Taiwan (Luo, 1992; “Kejia wenshi” [Hakka culture and history], 2007), and from time to time conflicts occurred between both groups (Brown, 2004). Together with the aborigines who inhabited the mountainous areas, the population of Taiwan was both ethnically and linguistically diverse, and amounted to approximately 2.5 million at the time of the Japanese takeover (Tang, n.d.; J. Zhang, 2000).

### **Social and Political System under Japanese Rule**

In 1895, Taiwan became a Japanese colony, when the Qing Dynasty lost the Sino-Japanese war and signed the Treaty of Shimonoseki, ceding the island of Taiwan to Japan. This era lasted until 1945, when Japan was defeated at the end of the Second World War. As Taiwan was the first overseas colony Japan acquired in its southward expansion during the late 19<sup>th</sup> century, Japan intended to turn the island into a “model colony,” one that would serve as proof to the western colonial powers of its competence in this regard (Z. Z. Lin, 2006). As a result, Japan expended much effort to develop the island, including its economy, industry, public works, and culture. Despite this, the worlds of the colonizers and colonized were sharply divided. In education, this meant that Taiwanese and Japanese children normally went to separate schools, following different life tracks and career paths

(Tsurumi, 1977; Z. Z. Lin, 2006). The fifty years of Japanese rule are generally divided into three periods: early years (1895-1915), Dōka: “Integration” (1915-1937), and Kōminka: “Subjects of the Emperor” (1937-1945) (Hsu, 2006; Cai, 2000, 2007; Lamley, 2006; “Taiwan jianshi—Riben tongzhi” [Brief history of Taiwan—Under Japanese rule], 2004).

### **Early Years (1895-1915)**

The period between when the Japanese government officially entered Taiwan in 1895 and the Tapani Incident of 1915 are commonly referred to as the early years of Japanese rule (M. Zhou, 1994; Z. Tu, 1992). After Taiwan was formally ceded to Japan under the Treaty of Shimonoseki, Japanese control over the island was really a military occupation that met with popular resistance from the people of Taiwan. This period was thus marked by popular uprisings and military suppression. The resistance began with the creation of the Republic of Formosa, based in Taipei and later in Tainan. Amid the uproar caused by China’s decision to cede Taiwan, a pro-Qing group declared independence and proclaimed the Republic of Formosa in 1895. The new Republic, however, was short-lived, after Japan successfully seized the base of the Republic and its leaders fled Taiwan for the Mainland (M. C. Wu, 1994).

After the defeat of the Republic of Formosa, a series of anti-Japanese uprisings took place in northern Taiwan in the form of guerrilla warfare, which gradually died down by 1902. It was not until the Beipu Incident, in 1907, that another major uprising occurred. Breaking out in Beipu, in north-central Taiwan, this revolt was a Hakka-led anti-Japanese uprising, which in the end was suppressed by the colonial government, and led to hundreds of locals being arrested and executed, including many Hakka (P. Li, 2008).

The Tapani Incident of 1915 marked the high point of armed resistance. Based in Silai Temple, Tainan, this revolt was also called the Silai Temple Incident, and was the largest nationalist uprising against the Japanese administration in Taiwan, and also the one with the most casualties. It marked the end of armed resistance by the Han Chinese, and subsequently led the colonial government to pay more attention to southern Taiwan, since most of the earlier uprisings were based in north or north-central areas (Katz, 2006; S. Tu, 2000; M. C. Wu, 2009 a).

The nationalist uprisings that happened during this period were basically a form of Chinese nationalism that gradually turned into a Taiwanese consciousness, since at the beginning Taiwan was more like a “place of China” than a “nation” to Taiwanese people at that time. As Meisner (1963) notes, there was “a general sense of loyalty to the Chinese empire” and people “felt themselves to be Chinese in 1895” (pp. 94-95). Historian Wang Hsail-po (as cited in Ching, 2001) argues that under Japanese rule the sense of Taiwanese identity exhibited in the anti-Japanese revolts were in essence an expression of Chinese consciousness, which can be seen as “all-inclusive Han Chinese ethno-national consciousness (p. 63). Brown (2004) even argues that people in Taiwan did not really regard themselves as a group before 1895. According to her, although the Han in Taiwan viewed themselves differently from the aborigines, they also distinguished among themselves, splitting into “Hoklo” and “Hakka” groups, who did not always get along either. The Japanese colonizers “revived the Han consciousness in the minds of the Taiwanese” (Ching, 2001, p. 72). However, there was then a change in identification, starting in the year 1911. Before the Chinese Nationalist Revolution of 1911, most of the uprisings in Taiwan were linked to “loyalty to the Qing”, which even motivated the creation of the

“Republic of Formosa.” Moreover, the rebellions were a form of resistance to the brutality of Japanese rule, rather than an attempt to establish a new nation. But after 1911, the number of anti-Japanese nationalist uprisings in the name of reunification with China decreased, a fact which is likely related to the collapse of Qing Empire, the nation people in Taiwan used to identify with (Y. Wang, 2002).

To suppress these uprisings, in 1898 General Kodama Gentarō was appointed as the Governor-General of Taiwan, with Gotō Shinpei as his Chief of Home Affairs. Gotō was racist, holding that the natives of Taiwan were biologically inferior and thus they could never be fully assimilated into the Japanese nation. His views were similar to those of the Western powers, like Britain and France, towards their own colonized subjects, and hence their way of ruling them. More specifically, the General did not wish to govern Taiwan in the same way as the Japanese Home Islands were ruled, but instead proposed a whole set of different laws to be used in to suppress dissent and maintain social stability (B. Yang, 1996; “Taiwan jianshi—Riben tongzhi” [Brief history of Taiwan—Under Japanese rule], 2004), which included a segregated education system for the locals and Japanese.

From the very beginning of Japanese rule, a colonial economy policy was put into effect, with all the human and natural resources from Taiwan to be used to aid the development of Japan. As Grajdanzhev asserts, “Taiwan is a Japanese colony, the economy of which has been developed to serve the economic needs of Japan proper and the military needs of the Japanese base established there” (Grajdanzhev, 1942, p. 323). Therefore, in these early years, sugar and other cash crops, such as rice, tea and bananas, were the dominant exports to satisfy demand within the so-called Home Islands (Grajdanzhev, 1942;



Meisner, 1963). However, local Taiwanese did not benefit from these exports, because, as Meisner (1963) notes, “much of the industry that was developed was ...largely under the control of Japanese capital,” (p. 96) who decided the price and severely exploited farmers. To ensure a profitable source of raw materials for export, relatively low levels of consumption by the local Taiwanese people were strictly maintained (Meisner, 1963). With an emphasis on the sugar economy, railways were built around the island. Keelung Harbour and Kaohsiung Harbour were built to transport the resources off the island, and these represented the largest and most significant construction projects in Taiwan under Japanese rule. For the purpose of industrialization, the first hydraulic power plant was built in the north. Other public works projects included setting up public clinics throughout the island to control the spread of epidemics, as well as introducing sewage systems and running water. The colonial government also made establishing a banking system to maintain fiscal stability one of its primary goals, so that shortly after the landing of the Japanese a branch of Osaka Bank branch was established, followed by the Bank of Taiwan, the Changhwa Bank, and others (M. Zhou,1994; Guo, n.d.).

### **Dōka: "Integration" (1915-1937)**

Inspired by two factors, the Japanese policy of colonial rule took a dramatic turn after 1915. First, the growing waves of nationalism and calls for self-determination among colonial subjects after the end of the First World War led many colonial governments to relax their colonial policies. In the case of Taiwan, as mentioned above, the Taiwanese opponents to Japanese rule turned away from China to advocate Taiwanese nationalism by the end of the Early Years, with the Tapani Incident of 1915 marking the end of the Han people's armed resistance, and subsequent nationalism being mainly expressed in

non-violent forms. Second, in the mid-1910s to 1920s, the changing political climate in Japan brought gradual democracy to the Japanese government. As a result, in 1919, the first civilian Governor-General of Taiwan, Den Kenjirō, under the Prime Minister, Hara Takashi, agreed to pursue a policy of assimilation, based on the belief that Taiwanese people were similar enough to the Japanese and they could be fully absorbed into Japanese society. At this time it was proposed that the same governmental system that was used in the Home Islands should also be used in Taiwan (Cai, 2000).

The name “Dōka,” literally meaning “assimilation,” marked the view that Taiwan was an extension of the Home Islands of Japan, and that Taiwanese people should be educated to be like Japanese subjects, and thus to be loyal to the Emperor. The interests of the colonial government thus expanded from constructing public works, such as railways, and utilizing the island’s resources, to focusing on many ways to integrate the colonial subjects. Throughout this period many public works and fiscal projects were carried out. More highways, harbours, banks, and telecommunications networks were built. The rice industry became Taiwan’s primary export in the 1920s. The agriculture-based economy of Taiwan then changed after 1930, when Japan decided that the island should pursue industrialization to meet its war needs. To this end, a huge dam that supported a big hydraulic power plant was constructed in central Taiwan (Guo, n.d.).

Following economic growth and social stability, colonial rule was gradually liberalized. Local governance was instituted, an elected advisory committee, which included the locals, was established, and a public education system was developed, which changed the secondary school system to a non-segregated one, although the elementary system remained segregated.

The use of the Japanese language by locals was rewarded. Near the end of this period, democratization was also introduced onto the island, with local assemblies established in 1935 (S. Wu & P. Cai, 1971; W. Zhou, 1997).

As mentioned above, the Taipani Incident of 1915 was the last Han Chinese-led anti-Japanese uprising. After that, armed uprisings mostly died down and Taiwanese nationalism appeared more in the shape of peaceful, spontaneous cultural and socio-political movements. During this period, several cultural and social associations and publications were launched, calling for democratization and greater autonomy (W. Zhou, 1997)

The calm lasted until 1930, when the Wushe Incident occurred. Lying behind this violent revolt was the long-standing discrimination and brutal treatment the aborigines received from the colonial government. The Japanese discriminated against the aborigines much more severely than they did against the Han, with the former seen as barbarians who required different forms of education to the latter (Tsurumi, 1977). Hence, “public schools for the barbarians” were set up in aboriginal communities. The Wushe Incident originated in the aboriginal region of Wushe, in central Taiwan, which the colonial government chose as the center for its “ruling the barbarians” policy, resulting in the massacre of about 300 Atayal insurgents and the suicides of many of their relatives and fellow tribesmen. This was the bloodiest anti-Japanese uprising in the history of Taiwan. After the Incident, the government modified its aboriginal policy by changing the old and discriminatory form of address for aborigines, “Fanren [barbarian],” to “Takasago” in 1936. Between the 16<sup>th</sup> and 19<sup>th</sup> centuries, “Takasago” was the Japanese for “Taiwan.” In addition, the colonial government implemented its Kōminka policy on the aborigines, relocating them in the plains,

and desegregating the elementary educational system, although part of the aboriginal school system still remained segregated, as will be discussed later in this chapter in more detail (Tsurumi, 1977; M. C. Wu, 2011; W. Wu, 2009).

### **Kōminka: "Subjects of the Emperor" (1937-1945)**

The rise of militarism in Japan in the mid- and late-1930s led the state toward its goal of dominating Asia step by step (Conroy, 1955). With the eruption of the Second Sino-Japanese War in 1937, Japan badly needed the natural and human resources from Taiwan. As Ching (2001) writes, there was “a sense of abruptness and urgency for the implementation of Kōminka” (p. 93). Although the Taiwanese people had been Japanese for over 40 years, there was still a concern over the Taiwanese people’s loyalty to the Emperor in the war against China, with whom the locals shared a common origin. A very different colonial policy from that which applied in the previous stages was thus conceived during this period, where the main goal was transforming the Taiwanese into loyal subjects, so that they would fully engage in the war effort. Simply put, the Kōminka policy wanted the colonized subjects to be not only Japanese, but also “good Japanese,” from “living as a Japanese” to “dying as a Japanese” (Ching, 2001, pp. 93-94).

As a result, the colonial government devoted full efforts to the Kōminka movement, which in essence was a brain-washing movement that targeted six million Taiwanese people and aimed to build up a Japanese identity among them, so that they would be “subjects of the Emperor” (Ching, 2001). In the “national language movement,” the “name-changing program” and the “volunteers’ system,” as the research participants testified, Taiwanese people were strongly encouraged to speak Japanese, wear Japanese clothing, convert to

Shintoism, adopt Japanese names, customs and cultural practices, and serve as volunteer soldiers. Although historians have different perspectives on whether Kōminka was simply an extension or intensification of Dōka (Peattie, 1984), or a new effort to completely annihilate the pre-existing colonial identities (Ching, 2001), it is generally assumed that Kōminka derived from Dōka. Arguing that the issue of identity should be seen as fundamental in the Kōminka movement, Ching describes it as a cultural-political campaign that aimed to transform the colonized people into imperial subjects, where the colonized struggled “between cultural assimilation and political discrimination” (2001, p. 91).

As Ching (2001) notes, to become Japanese was not only “an attitude of inner conviction or faith, but a series of corporeal attitudes,” which was “the externalization of colonial ideology itself” (p. 89). Through this mechanism an inner faith or belief is generated, and this “discipline,” to adopt the term used by Tomiyama Ichirō (as cited in Ching, 2001, p. 90), was externalized in a number of performative manifestations, including visiting Shintō shrines, using Japanese names, and shouting “Long live the Emperor,” which were seen as essential in making Taiwanese people “become Japanese.”

Throughout most of Japanese rule, the colonial government did not interfere with the people’s existing religious practices, which were mostly Buddhist, until the Kōminka period, when the government believed that converting Taiwanese people to Shintoism would accelerate assimilation. To this end, the policy changed from encouraging people to accommodate Japanese elements of Shintoism into existing Buddhist temples and family worship practices, to strongly promoting Shintoism instead of Buddhism. After 1934, more Shinto shrines were built in local communities than in previous stages, with the view to

replacing the functions of Buddhist temples (W. Zhou, 1997; Hsu, 2006). At school, worshipping at such shrines became a routine part of education. Students not only had to clean the shrines, but also grew crops to serve as offerings in them. Besides having to worship in shrines instead of temples, the population was ordered to discard or burn the ancestral tablets and statues of gods, and replace them with Japanese Ofuda, a talisman made of paper, wood or metal, issued by a Shinto shrine, inscribed with the name of a kami (spirit), and used for protection in the home. The order was met with mass complaints, but was eventually accepted by the Taiwanese people, as with superficial compliance many families accommodated both traditions in their family worship shrines. By 1941, the number of families that worshiped Ofuda in their shrines, according to official statistics, reached 70% (Cai, 2001a, 2001b; Cai, 2009).

The law which made Taiwanese people change their Chinese names to Japanese ones was implemented in 1940. This name-changing was not mandatory, because governmental approval for such changes, which was based on the qualifications of the applicants, was necessary. This meant that not everyone who wished to adopt Japanese names could do so. Judging from the fact that only about 2% of the population had adopted Japanese names by 1941(W. Zou, 1997), the law was not enthusiastically observed. Although the high standards set by the colonial government may be the main reason why this figure was so low, the reluctance of the locals, especially the intellectual elite, played a part too. As Z. S. Lin (1992/ 2011) recalls, he was the last among his classmates to adopt a Japanese name, as his father, a leading figure in cultural circles, was opposed to the practice. When he chose a Japanese name to use at school, as his teacher requested, he dared not let his father know. He writes that none of his father's close friends adopted Japanese names, although they were

fluent in Japanese and associated with Japanese people. That said, many members of the elite chose to comply with the policy. Later, the law was loosened, and more people were able to adopt Japanese names if they wished. This, however, led to an interesting phenomenon, in which those who were able to adopt Japanese names under the government's strict screening in the early years of the policy looked down upon those who adopted such names after the policy had been loosened (Z. S. Lin, 2000). The former referred to the latter as a mixed fabric used for making clothes, and referred to themselves as a pure cotton fabric, to show that their Japaneseness differed, and the latter were "not pure" (personal communication with Z. S. Lin, July 10, 2010). An analogy was found under the KMT rule, where the northern Taiwanese looked down upon the Mandarin spoken by those from southern Taiwan, and referred to them as "Xiagang Ren," meaning people who live in southern rural areas, in spite of the fact that they both acquired Mandarin as colonized peoples, and that their Mandarin was second rate in the eyes of the colonizers. These phenomena clearly show the impact of Gramsci's concept of "hegemony" on ordinary people, when they have internalized the interests and values of the ruling group in a process called neutralization/ normalization, and thus see the process of social differentiation as normal. This concept was discussed in more detail earlier, in Chapter 2.

During the last four years of the Kōminka movement, people in Taiwan were encouraged to fight for the Japanese. In 1942, with the expansion of the Pacific War, people were called on to volunteer for the Imperial Japanese Army and Navy, and in 1945, a comprehensive draft was ordered, which resulted in the death of many Taiwanese youths while serving in the war (Lu, 1997). During this period, Taiwan also suffered severe

economic repercussions from continuous bombing raids, which came vividly to the memories of the older participants during the interviews.

As mentioned above, nationalism largely appeared in non-violent forms after the Early Years. However, in the Kōminka years, even the non-violent political and cultural activism of the Dōka era was completely banned (S. Wu & P. Cai, 1971).

### **Education and Language**

Tsurumi (1977) describes the education system in Taiwan under Japanese colonial rule as basically ethnically segregated and discriminating, and the related policies can be divided into three stages. In 1919, the first Education Imperial Rescript was announced, stipulating different school systems for the Hans, Japanese, and aborigines alongside the expanded common school systems, Kōgakkō (public schools), and curricula for the Taiwanese people. Schools for aborigines, Banjin Kōgakkō [“barbarian” public schools], were established in aboriginal areas. Japanese people had a different school system, Shōgakkō [elementary schools], that used the same curriculum as used in the Home Islands of Japan. Except for very few children from families with high social status, Taiwanese people were not allowed to enter the Japanese schooling system (Lu, 1997). Secondary and post-secondary school education was also segregated, and was primarily restricted to Japanese nationals. In areas with only one high school in the neighborhood, two-thirds of the students were Japanese and the other third were Taiwanese (Lu, 1997). Given that the population was composed of 4.5 million Taiwanese but only 0.5 million Japanese, these proportions reveal the discriminatory treatment Taiwanese people received regarding their educational opportunities. In essence, there were separate tracks for Taiwanese and Japanese people in Taiwan. Most locals went



into the vocational school system, as increasing productivity was the focus of the government. In 1922, the second Education Imperial Rescript stipulated that the elementary school system remain segregated. But the secondary school system was not segregated, which meant that the Japanese could attend secondary schools that were originally for Taiwanese students. The result was that admission to these schools became much more limited for Taiwanese students, due to the fact that they had to be shared with Japanese students (Hsu, 2006; Lu, 1997).

At the level of higher education, the colonial government had a strict policy which meant that the Taiwanese could not receive this, or if they did, they could only major in a few rather limited fields, such as education and medicine (Z. Z. Lin, 2006). In order to receive a higher education, many members of the Taiwanese elite set out to become teachers and physicians, the two most respectful vocations in Taiwan society until today. Another way that Taiwanese people could pursue higher education was to study in Japan, but there they often confronted with even more severe discrimination than they faced in Taiwan (*Ibid.*).

The segregated school system did not change until 1941, with the announcement of the third Education Imperial Rescript, which stipulated that all the schools should be unified as part of the same system, and be renamed as Kokumin Gakkō [national schools] to educate both Japanese and Taiwanese children, although most of the aboriginal public schools remained segregated (M. Lin, 2000). As a result, many of the research participants who were born in the 1930s recalled going to different schools from Japanese children. Even under the new policy, different teaching materials were used for Japanese and Taiwanese

students. Primary education was compulsory, and the Taiwanese children had to enter common schools for six years. At school, besides basic academic subjects, such as composition, reading, writing and mathematics, emphasis was also put on physical education, singing and morals. Thanks to compulsory primary education, by 1944 Taiwan had the second highest primary school enrolment rates in Asia, with 71.3% of Taiwanese children, 86.4% of aboriginal children and 99.6% of Japanese children going to primary school (Taiwan Provincial Administrative Executive Office, 1946; P. Xu, 2005).

After the Japanese colonized Taiwan, the Japanese language was promoted in the common schools for Taiwanese and aborigines. However, Taiyu and literary Chinese were not officially banned, so the first generation born under Japanese rule was able to maintain their literary Chinese and home language, under the influence of the older generation of the family, while at the same time becoming fluent in Japanese. Z. S. Lin (1992/ 2011) recalls that his father and his father's friends, born between 1900 and 1910, were confident in writing both Chinese and Japanese, as well as speaking both Taiyu and Japanese. Their link to Chinese culture was stronger than that of Lin and his generation, born after 1910, as the latter grew up without much connection to Chinese culture. Lin himself and his friends (born in the 1920s) were more confident in writing Japanese than Chinese, with the former being their primary language. For Taiwanese people who grew up during this period, Taiyu was still the language used at home, but Japanese became the language they used to connect with the world and to get modern knowledge.

In 1937, at the beginning of Kōminka, due to its inability to effectively promote Japanese among the locals over the previous decades, the Japanese government ordered that

Chinese newspapers be abolished (Cao, 1997;Hsu, 2006), speaking Taiyu be strictly prohibited in normal schools, and the use of the Chinese script and Chinese plays be banned. The difference in language policy before and after 1937 is best illustrated in Ching (2001), which notes that in May 1934 those who used Taiwanese language at school were subject to fines, while by 1937 “the use of Taiwanese language had become a liability to one’s livelihood” (p. 95). The result was a drastic rise in the use of Japanese language after the 1930s. According to official statistics, in 1944 the percentage of people in Taiwan who could use Japanese had risen to 71% (S. Huang, 1995; Mendel, 1970). What came with this change from one language to another was a change in cultural values and world view. Z. S. Lin (2000) notes this by pointing out that people of his generation (i.e., born after 1910s) had more trouble fitting into Chinese society after the Retrocession, as they were immersed in Japanese education, the Japanese way of thinking, and the Japanese way of dealing with the world.

Besides officially ordering Japanese to be spoken at school, the “National Language Movement” was established to promote Japanese more effectively in society, under which the government labelled families in which Japanese was used at home by people under 60 as “National Language Families.” In the wartime, when food and resources were in short supply and a policy of discrimination was also applied to food distribution, a “National Language Family” was entitled to the same food supplies as Japanese families were, which were better than those other Taiwanese households received (M. C. Wu., 2009b; W. Zhou, 1997). Later in this chapter, participants’ accounts of these National Language Families will be discussed in more detail.

## What People Remember

### Social Order

The interviewees were asked to recall life during the Japanese era. What they remembered most vividly, besides going to separate schools to Japanese children, was the well-maintained social order, which, implied in their accounts, was achieved at the cost of losing their freedom over many things in everyday life. Japanese policemen were major characters in their memories, who maintained social order by enforcing numerous regulations. They were remembered as very stern, uncompromising and terrifying figures who were the reason why the Taiwanese society could be so advanced, organized and secure. In *Shinn*'s account, Japanese policemen were compared to today's policemen, and were remembered favourably for being rigorous, strict, and responsible, as well as for their self-discipline. He recounted, "Unlike today's policemen who avoid their duties, Japanese police were serious about carrying on their responsibilities. They never compromised" (*Shinn*, male, business owner, 74, focus group #3).

*Shinn* gave the following account to illustrate how Japanese policemen enforced the laws, how painstaking they were about details to ensure that people were law-abiding and social order was maintained:

They were strict but they were disciplined, and they made us feel that our lives were protected. There was no such thing as bribery. We did not even have to close the doors of the house when going out or sleeping at night. No one dared to risk being caught as burglars and being severely punished. (*Shinn*, male, business owner, 74, focus group #3)

In fact, what the interviewees remembered about the police was part of the colonial government's social control policies. The Japanese policemen were given great power and authority to control the subordinate Taiwanese people in every respect, from maintaining public security to public and personal hygiene. *Shinn* remembered that the police were addressed as "Daren [your highness]," a term used to address those in higher positions, showing people's respect and fear for them. "They were harsh, but Japanese soldiers were even harsher. Their responsibilities covered almost every aspect in our daily life, where we should hang the wet laundry, how we should clean the house and throw the garbage, everything," said *Shinn* (male, business owner, 74, focus group #3). Indeed, practically everything in a person's daily life was supervised by the policemen, and people were law-abiding because they were under such close watch.

However, this fear of and respect for Japanese policemen may only have been superficial, and things that were enacted for the policemen to see, because, as in *Yochi's* account, people also had many complaints about them being over strict:

Taiwanese people refer to people as animals to show their hate, dislike, or grudge...Japanese policemen were called "dogs" behind their backs. After the Mainland Chinese came, they were called "pigs," which was much worse, in fact, because at least dog would watch the house, but pigs could do nothing for you.  
(*Yochi*, male, teacher, 75, focus group #1)

Besides the police, the Baojia system, another important part of the Japanese government's social control policies, kept every Taiwanese family under close surveillance. The Baojia system was an extension of part of the Qing's surveillance policy, but with some

modifications. Within the system, ten households became a “Jia”, and ten “Jia” formed a “Bao,” each with an elected chief. If there was a crime, people living in the same Bao and Jia as the culprits would all be punished, and so people were encouraged to keep a watchful eye on their neighbours and always report anything unusual to the police (Z. Chen, 2009; Z. S. Lin, 1992/ 2011). *Shinn* told a story about his grandfather, who was a “Bao” chief:

My grandfather was a “Baozheng”, like a village chief. People feared him a lot and also respected him. He knew almost everything happening in his “Bao.” For example, when people gathered to gamble in someone’s house, my grandfather would know it, and before he arrived to catch them, the gamblers just fled. (*Shinn*, male, business owner, 74, focus group #3)

Therefore, the “Jia” and “Bao” chiefs stood between the Taiwanese and the colonial government, as well as its policemen. They acted on behalf of the government by announcing state orders and laws, and helping the police maintain social order. As they were elected by villagers, they were mostly highly respected elders. Besides alleviating the workload of policemen, they also acted as a buffer between the Japanese policemen and locals, as *Shinn*’s grandfather did.

Besides the uncompromising Japanese policemen, people were also impressed with how the Japanese government constructed Taiwan and helped it develop into a more advanced society. They built so many highways and reservoirs, and maintained security so well that, as *Mishi* commented, “At that time [when Japan was defeated in 1945], we did not expect the society would become better after the Mainland Chinese came” (*Mishi*, male, teacher, 80, focus group #12).

While many studies have documented the brutality of Japanese rule and the armed resistance from the locals (see for example, X. Huang, 1995), the accounts of my participants tell a somewhat different story. Generally, their memories of Japanese rule were mostly positive. As mentioned above in the accounts of *Shinn* and *Yochi*, the Japanese government was harsh, but life under it was secure. *Mont*, a participant from the peak-KMT group recalled that he only heard positive things about Japanese rule from his parents (*Mont*, male, teacher, 45, focus group #6).

Two things may account for the discrepancy between what the documents say and people's lived accounts. First, all of my research participants from the Japanese group were born after 1930, and thus did not witness any of the anti-Japanese armed resistance. As discussed earlier in this chapter, the armed revolts mostly died out after 1915, with the exception of the Wushe Incident of 1930, which involved the aborigines instead of the Han Chinese. Second, the same participants had witnessed the coming of the Mainland Chinese, which made a great difference in how they saw the Japanese. As *Penny*, also an interviewee from the peak-KMT group, recalled:

My father used to say that there was a sharp contrast between the Japanese and the Mainland Chinese. The former were always tidy and neat. They set up numerous rules but as long as you were law-abiding, you were in a secure society. He had positive comments about the Japanese, while negative ones about the Chinese. (*Penny*, female, businessperson, 48, focus group #6)

The differences between the Japanese and Chinese were mentioned in the accounts of the Japanese group, indicating that these affected how they viewed the former, and also had an impact on their resistance to becoming Chinese.

### **National Language Families**

As discussed earlier, the Kōminka movement aimed to convert colonized Taiwanese to loyal imperial subjects by completely changing their values. The use of the “national language,” i.e., Japanese, was a key issue in Kōminka, as this went beyond the function of communication, and also served as a tool to educate people with the values they should have as subjects of the Emperor.

A number of benefits and privileges were linked with the label “National Language Family,” with such families using only Japanese at home. After applying for the designation, candidate families had to be investigated before a certificate was awarded in a public ceremony. A “National Language Family” plaque hung on the front door of such homes, not only as an honour, but also as a sign that the family was entitled to better access to many things, such as twice the normal food rations, better schools and government job opportunities (Hsu, 2006). *Yinno* and *Daisy*, who were sisters, talked about their family experience of being a “National Language Family”:

Our family was a National Language Family and it gave us access to a better food supply, which was a privilege that only the Japanese families had. For example, Japanese families could buy tofu, while Taiwanese families could only have dried bean curd. Becoming a National Language Family meant we could get tofu, as the Japanese did. (*Yinno* and *Daisy*, females, homemakers, 76 and 74, focus group #8)



In wartime, when food was short, access to more and better food became an incentive to become a “National Language Family.” In addition to more food, only qualified “National Language Families” were allowed to adopt Japanese names at this time (Lu, 1997). However, the laws governing how to become a “National Language Family” were very strict, and the standard was set too high for most people. As Lu (1997) notes, “Kōminka families” (meaning those that were “National Language Families” and adopted Japanese names) enjoyed high social status, equal food supplies and educational resources as Japanese people. Despite coming from a family that was not a privileged Kōminka one, Lu was able to enter the medical school of Taipei Imperial University, which admitted mostly Japanese people. According to Lu, this was only possible because of the numerous hardships that he had to overcome, and the efforts that he made to achieve this were many times greater than those made by Japanese students and those Taiwanese ones from Kōminka families.

We may assume that many families became “National Language Families” due to the benefits they could thus receive. However, this is not necessarily true. First, in practice it was difficult for all family members to be fluent in Japanese, as many people were uneducated, and most families had people who were perhaps too old to learn a new language. Second, although about 70% of the population knew Japanese by 1944 (S. Huang, 1995; Mendel, 1970), the number of “National Language Families” was low, with less than 1% by 1942 (S. Huang, 1993). According to the interviewees, Taiyu was still the language they used at home. In fact, Taiyu was used almost everywhere among Taiwanese people, except in class at school, even for “National Language Families.” *Yinno*, whose family was a “National Language Family,” said that they still had to use a lot of Taiyu at home, since her

elderly relatives and the servants could not speak Japanese (*Yinno*, female, homemaker, 76, follow-up telephone interview).

### **Separate Schools**

In the interviews, participants were asked to recall their first day or first few days attending school. They talked about anything they remembered about school, including the language used in class, during recesses, and with classmates, as well as their memories of their teachers and classmates, what they learned, school discipline, and so on. Five of the Japanese group who lived in Urban # 1 and its suburban areas commented on the ethnic composition of the elementary school they attended. They said that there were only Taiwanese children in their schools, as there were separate schools for Taiwanese and Japanese children. As *Mishi* remembered, “There were only Bensheng (in-province/ Taiwanese) children in the school I attended, JX Elementary School. Japanese kids went to GY Elementary School and NM Elementary School. Their schools had swimming pools” (*Mishi*, male, teacher, 80, focus group #12).

Memories of separate schools for Taiwanese and Japanese were also shared by four other interviewees, *Shinn*, *Tamu*, *Daisy* and *Yinno*, and a younger interviewee of the mid-KMT group, *Grace*, who was born in 1944 and had older brothers with pre-228 Incident school experiences. *Grace* remembered that in the Japanese era, Teachers’ College admitted only Japanese people and Taiwanese students from wealthy families:

My brother could not enter it, because we were not qualified. TN High School, where I had intended to study, was also only for Japanese and rich Taiwanese people.

Taiwanese children from ordinary families did not have a chance to enter it. (*Grace*, female, teacher, 66, focus group #7)

*Tamu* also remembered separate schools for Taiwanese and Japanese students, “Before the Retrocession, The Second High School in my hometown was for Japanese students, and the First High was for Taiwanese” (*Tamu*, male, university teacher, 79, focus group #8). The other interviewees, who lived in rural areas, did not mention separate schools, though they noted that only Taiwanese children went to their schools. Although there seems to be an urban vs. rural difference at play here, it can actually be explained by the fact that the Japanese mostly resided in urban areas, so that only those from these areas recalled a separation between Taiwanese and Japanese children, which represented the social division between the ruler and the dominated, as will be discussed below.

Separate schools reflected part of the colonial system of rule, which was based on creating social distinctions between the rulers and ruled. Note that from the second and third stages of Japanese rule, the *Dōka* and the *Kōminka*, onward, “integration” and “assimilation” were the official government’s stated aims. However, the whole social system was one of sharp divisions between ethnicities (i.e., the Japanese, the Taiwanese, and the aborigines) (Tsurumi, 1977; W. Wu, 2009). The situation is best summarized by *Mishi*’s comment, “Even if we wanted to become Japanese, they did not let us” (*Mishi*, male, teacher, 80, focus group #12).

What *Mishi* suggested was that while the Taiwanese were Japanese nationals in name, they were never treated as “real Japanese” by the government. The “discouraged Japanese identity” that people experienced is also noted by Z. S. Lin (1992/ 2011). As will be further

discussed in Chapter 8, this caused a problematic struggle with regard to identification among the colonized Taiwanese people.

The boundary between the colonizers and colonized was hard to transcend, unless the dominated conformed to the rulers' standards, such as becoming a "National Language Family" or adopting Japanese names. With this carrot-and-stick policy, the ruled gradually adopted, or aspired to adopt, the rulers' values, such as language, as the norm, and in this way hegemony was constructed. What was historically created then became invisible to people on a daily basis, as this situation was seen as natural. Cultural hegemony was not only built in this way in the Japanese era, as the KMT regime also focused its efforts to transform the Taiwanese people on language and education policies. The tragedy here in both cases is that while the ruled group lost their original identities by adopting the ruling group's culture, values and interests, they were never treated as "real Japanese" or "real Chinese," even though they struggled to conform to the hegemonic values.

### **Language—Home Language and Japanese**

As discussed above, the colonial government's language policy did not become very strict until the Kōminka period. While Japanese had been the language of instruction in school since the beginning of Japanese rule, students also learned literary Chinese, as indeed did children in Japan (S. L. Wang, 1999). The government also did not order that the population use only Japanese before the Kōminka era, and while people were encouraged to learn and use Japanese, no law was enforced to make it mandatory. However, this situation became very different under the Kōminka movement.

As four interviewees recalled, when they were in elementary school Japanese was the only language used for instruction, and speaking Taiyu was strictly prohibited and punished. These participants were situated in the high period of Japanese imperialism, between the outbreak of the Sino-Japanese War in 1937 and Japan's defeat in World War II in 1945. *Mishi*, for example, remembered his Japanese teachers as very stern, "No one dared to speak home language at school as the punishment was severe. The Japanese teachers were very strict about making us speak Japanese only at school" (*Mishi*, male, teacher, 80, focus group #12).

According to the interviewees, they used Taiyu at home with parents, while at school they only used Japanese. Generally speaking, they did not remember their parents made much effort to pass on the home language to them, but just naturally used Taiyu at home. Nor did their parents stress the link between Taiwanese identity and Taiyu. For them, Taiyu was something they were born with, and that was naturally there without having to assert its existence. This attitude partly accounts for why Taiyu was not used as a marker of ethnic or national identity by parents back then, an attitude different from today.

With regard to how they viewed the Japanese language, as five from the Japanese group, *Tamu*, *Yochi*, *Yinno*, *Shinn* and *Mishi*, mentioned, they did not see it as a foreign language imposed on them, as they came into contact with it at a very young age. In addition, parental attitudes toward the Japanese were not negative or resistant, which may be explained by the fact that ordinary people cared more about surviving and thriving in their daily lives than about who their rulers were. Life went on whoever the government was, and people had to compromise in order to get on in life. Moreover, since there were clear

benefits linked to using Japanese, people had strong incentives to move toward the language and values of the colonizers. This was also seen when the KMT came to replace the Japanese as rulers.

One thing of interest here is the overall lack of gender differences in how men and women respondents recalled life under Japanese rule, whether it is their memories of separate schools or their feelings over not being taken as authentic Japanese. This lack of gendered reflections may be attributed to the focus groups used for this cohort, which were gendered in two senses. First, males far outnumbered females, and secondly, in the focus group with both genders, *Tamu*, the husband, tended to dominate the conversation by always speaking before the two women, his wife and sister-in-law, expressed their opinions. As briefly mentioned in Chapter 3, the lack of gender patterns found in this work does not imply that gender as a factor played no role in the identity formation of the Japanese cohort. Instead, it is likely that this lack was a result of the influence of a gendered focus group.

### **Conclusion: Construction of Hegemony**

The attitudes outlined in the preceding sections provide an answer as to why people regarded it as natural to learn the language of their new rulers, whether in the Japanese or KMT era. However, as discussed above, what was seen as natural was actually the product of hegemony. Most of the time, the advantages of adopting the rulers' culture and value system, as well as the problems associated with not adopting them, were so obvious that the ruled decide to conform. Thus, while the rulers may have used laws, punishments and rewards to achieve their aims, it was basically the ruled who decided to adopt new values to further their own interests. In this sense, as was discussed in Chapter 2, this suggests the

subordinates' agency in participating in the construction of hegemony. The Japanese did bring a new language and new orders to Taiwan, but they also were able to maintain an organized and secure society, which ensured a stable livelihood for many people, and thus there was no clear reason to resist learning the new language. In addition, when learning the new language meant access to better education and occupations, as well as more and better food supplies, people were more motivated to do so. Gradually, as Gramsci argues, by using political, economic, ideological or cultural power, the ruling group made their interests and values those of the ruled. Hegemony was constructed, and everything that was actually created then looked "natural" (as noted in Jones, 2006). Thus, for example, instead of seeing enforcement and punishment as extraordinary, the Taiwanese population took them as normal, and ultimately the socio-political status quo was maintained.

Avoiding punishments, as mentioned above, was another incentive for complying with the ruling group's interests. As the interviewees noted, Japanese teachers and policemen were very strict about the enforcement of rules and laws. It thus made sense that people would rather abide by the monolingual policy than take the risk of being severely punished, especially when by doing so they could obtain better jobs, and when the rulers did ensure a secure and well-organized society.

This hegemonizing process was actually one of neutralization and normalization, which encouraged people to accept the Japanese language and values, and thus aim to become Japanese in the colonial era. As Jones (2006) notes,

Its effectiveness lies in the way it [the hegemonization] blurs the distinction between political authority and everyday life. What takes place in our homes, in our leisure

activities or in the shops seems, for the most part, apolitical. There is no need for someone to experience a blinding conversion to an idea—it is often already deeply enmeshed in the structure of their lived reality. (p. 48)

When the values and interests of the ruling class become the subordinates' lived reality, everything becomes normal and unproblematic, and thus the purposeful construction of hegemony is undetected. Similarly, this process also explains why in the KMT era, Mandarin and Chinese culture became the norm, enjoying superiority over the home language and culture, as well as why people tried to learn not only Mandarin, but good Mandarin, and is related to what Bourdieu calls “symbolic violence,” as cited in Jones (2006) and mentioned in Chapter 2:

...symbolic violence also takes the form of taste judgment, where outsiders are marginalized and shamed; of physical behavior and ‘way of living’ where some feel confident and others feel awkward; and in the unique distribution of educational qualifications. In these cases, a ruling power will see its authority reproduced, a subaltern group will aspire to the values and tastes of its superiors, and a ‘dominated’ group will see its lowly status reinforced. (p. 52)

Such mechanisms are mostly not detected and, in Bourdieu’s terms, become the subordinates’ lived reality. They are not recognized because they always hide within the dominant discourses, but their effects cannot be ignored in making, unmaking, and remaking social order and the construction of the state (Jones, 2006).

The experiences of the Japanese group revealed in this chapter illustrate not only the construction of hegemony through language and education as normal and natural, but the



impact of this on the struggle to build and maintain a sense of identity. In the process of moving toward the dominant values, people's views of their home language and culture were shaped and reshaped, and hence they struggled between identities, as seen in the participants' accounts of their lived experiences.

## Chapter 5

### **“We learned Mandarin naturally”—Early-KMT rule (1945-1949)**

“I could hardly pass the Mandarin tests. My mother had to find a tutor to help me.” (*Shinn*, male, business owner, 74, focus group #3).

“All of us learned Mandarin naturally, without resistance.” (*Wong*, male, merchant, 73, focus group #1)

“I started learning Mandarin right after I started going to school. I do not remember specific difficulties learning Mandarin. The learning happened naturally.” (*Manny*, female, teacher, 70, focus group #12)

This chapter examines the experiences of those who went to school during the early years of the KMT’s rule, starting from the Retrocession of Taiwan to China and the end of Japanese rule in 1945, and lasting until the 228 Incident, the imposition of martial law, and the mass arrival of the Nationalists in 1949. During this period, Taiwan was regarded as a province of the Republic of China (ROC), and thus many policies, including those related to language, were similar to those on the Mainland.

The chapter is mainly composed of two parts. The first sets up the background of the early years when the KMT strove to strengthen its legitimacy through establishing the dominance of Waisheng Ren and Mandarin. The second part deals with the growing conflicts behind the process of hegemonic construction, the 228 Incident and tensions in schools, as perceived by the early-KMT group. Finally, the conclusion questions the adoption of Mandarin by the early-KMT group, whose members mostly overlapped with the Japanese group, as “natural,” and traces this sense of “naturalness” to the effects of

hegemony. It also discusses how, for most of the group, their experience of living through the transition between Japanese and Chinese rule, especially their first encounter with the Chinese, played a role in their subsequent identity formation.

### About the Participants

Pseudo-nym	Gender	Birth Year	Occupation	Growing-up Place	Family Background	Highest Education	Language Used in Interview	Focus group #
Mishi	M	1930	elementary school teacher	Urban #1	merchant	teachers' college	Mandarin + Taiyu	#12
Tamu	M	1931	university teacher	Urban #1	farmers	graduate school	Taiyu	#8
Yinno	F	1934	homemaker	Urban #1	unknown	high school	Taiyu	#8
Yochi	M	1935	elementary school teacher	Rural #2	farmers	teachers' college	Mandarin + Taiyu	#1
Shinn	M	1936	business owner	Suburban #1	farmers	vocational high school	Taiyu	#3
Daisy	F	1936	homemaker	Urban #1	unknown	university	Taiyu	#8
Wong	M	1937	merchant	Rural #2	farmers	vocational high school	Mandarin + Taiyu	#1
Yo	F	1940	homemaker	Rural #1	farmers	junior high school	Taiyu	#3
Manny	F	1940	elementary teacher	Suburban #1	civil official	teachers' college	Taiyu + Mandarin	#12

Two female participants, *Yo* and *Manny*, were added to the group that experienced the early years of KMT rule. They had no experience of Japanese education, as when they started elementary school the era of Japanese governance had already ended. They were in the lower grades at elementary school during the early years of Mandarin-only policy. *Yo* was born in 1940 in Rural #1, in a farmer's family. Her highest level of education was high school, and she became a homemaker. In the focus group interview that she joined with *Shinn*, her husband in the Japanese group, and *Ji*, her younger brother in the mid-KMT group, *Yo* used Taiyu only. *Manny*, born also in 1940 and growing up in Suburban #1, is a retired elementary school teacher. *Manny's* father was a civil servant, and her mother worked as a farmer. She used both Mandarin and Taiyu during the interview.

The other seven participants were those from the previous chapter, who had received a Japanese education. They were children and young teens at this stage, with the oldest, *Mishi*, being about 15 years old, and the youngest, *Wong*, being about 8 years old when the Japanese era ended.

## **Constructing KMT Hegemony**

### **Coming of Mainland Chinese**

Taiwan suffered severe economic repercussions due to the war. On the one hand, Taiwan served the Japanese government by supplying it with needed resources. On the other hand, due to the Allies' continuous bombing, Taiwan's agriculture and industry suffered great damage, with many railways, power plants, hospitals, schools, and factories being destroyed. In 1946, the first year after the Retrocession, the industrial and

agricultural output of Taiwan had decreased significantly, to less than 40% of the levels seen in 1937 (Ye, 2010).

People looked to the end of the war as a chance for Taiwan to recover. They expected the new government to put an end to their suffering under Japanese rule. As one of the interviewees, *Yochi*, commented, “After a long period under Japanese rule, people had expectations for those from the fatherland” (*Yochi*, male, teacher, 75, focus group #1). *Yinno* also said, “We thought, ‘finally, the retrocession has come. Taiwan is finally recovered.’ We had expectations of the fatherland and looked forward to their [Mainland Chinese] coming” (*Yinno*, female, homemaker, 76, follow-up telephone interview). As a result, people had great enthusiasm for resuming their links with the fatherland and learning its language. However, more challenges were awaiting them with the coming of the new rulers, and before long they found their hopes dashed.

The Retrocession ceremony took place on October 25, 1945. Reports of the Taiwanese people’s joy at reuniting with the fatherland, and the Taiwanese elites’ enthusiasm to work with the new administration, made newspaper headlines the next and following days. *Taiwan Xin Sheng Daily News*, for example, had a story which described the event as follows:

Four hundred thousand Taipei citizens took pride in being able to participate in the historical moment. Long before the ceremony began, hundreds of thousands of people gathered, waiting to witness the scene...Celebrating the Retrocession, people in Taipei rejoiced. They sang; they danced... (“Qianwan ren dengdai zhe yimu [Anticipation of Taiwanese people for the day],” 1945, p. 3)

On another page, a highly respected member of the local Taiwanese elite, Lin Xian-tang, was reported as making a speech in the ceremony, promising to help the new administrator of Taiwan, Chen Yi, to construct a new Taiwan (“Qingzhu dahui zuori juxing [Celebration took place yesterday],” 1945, p. 4).

Reports of people’s joy at reunification with the fatherland were accompanied by two other major themes. First, the Taiwanese people were shown to be passionate about learning Mandarin, which reflected their connection with the Mainland and their enthusiasm for the new era Taiwan had entered into. Second, reports stated that during the previous 50 years people had continuously and secretly striven to resist Japanese rule, a sign of the eagerness to escape foreign control and reconnect with the fatherland. In an editorial titled “Tuixing guoyu wenti [The issue of Mandarin promotion]” in *Taiwan Xin Sheng Daily News* (1945, p. 2), the Taiwanese people, youth in particular, were said to seize every opportunity to learn Mandarin in their enthusiasm to rejoin the fatherland. Regarding media representations of the people’s desire to maintain connections with their fellow countrymen under Japanese rule, an editorial in *Taiwan Xin Sheng Daily News* was typical, and ran as follows: “Under fifty years of harsh Japanese rule, the Taiwanese people did not lose their confidence in the fatherland. Japanese rule only assimilated Taiwanese people on the surface. Deep in their minds, their link to the fatherland did not diminish” (“Dui dangqian taiwan wenhua yudong de yijian [My opinion of current Taiwan cultural movement],” 1946, p. 2).

The message conveyed in statements like these was that people not only aspired to resume the connection with the fatherland, to recover their links with Chinese heritage and become Chinese again, but that the bond between Taiwan and China had not been destroyed

even after the fifty years of alienation, and that people's compliance to Japanese rule was only superficial. However, these are representations from public documents, and the participants had different stories to tell about their reunion with the Chinese.

### **Initial disappointment.**

With the Retrocession, many Mainland Chinese came to Taiwan, mostly soldiers and government personnel. Taiwanese people looked for a new start with better lives, but instead the situation got worse. As will be discussed in more detail later, people were shocked by the contrast between the Japanese and Mainland Chinese soldiers, which cast a shadow in their minds about what their future would be like. The soldiers from the “zuguo [fatherland]” were so poorly dressed and ill-disciplined, and the people of Taiwan soon came to the painful realization that they were essentially going to be colonized by their “tongbao [fellow countrymen].” The KMT government, just like the Japanese colonial government, utilized Taiwan's sugar, rice, salt, textiles, and so on, to supply the military in the Nationalist-Communist civil war raging on the Mainland. In addition, the KMT's corruption led to inflation, which resulted in even shorter supplies of daily necessities and food. The new government's monopoly on tobacco, sugar, tea, paper, chemicals, petroleum refining, and cement, was basically an extension of the Japanese colonial policy (H. Wang, n.d.), as noted by the interviewees in this group.

The testimonies from those who experienced the change in rulers show people's shock and disappointment when actually confronting Mainland Chinese soldiers, in stark contrast to newspaper reports of universal joy. Before the Retrocession, because of their shared Chinese roots, many Taiwanese felt they were returning to the arms of their homeland, and

thus there was real enthusiasm for this change. However, with the defeat of Japan this simple nostalgia for a historical Chinese identity became more complex as the homeland became tangible and reachable. In short, since the earlier “Chinese” identity that many in Taiwan had was based on theory rather than reality, it was a shock when they encountered real people from the Mainland.

All of the interviewees in the early-KMT group recalled their own or their parents’ disappointment upon seeing the Chinese soldiers. *Wong*, for example, said that he lived close by a railway station and had many chances to see Waisheng soldiers, “They wore straw shoes and ragged shorts, carrying pots. They smelled very stinky” (*Wong*, male, merchant, 73, focus group #1). *Yochi* added:

I remember that we gathered at the railway station to hail soldiers from the fatherland, but we were so disappointed at the first sight of them...They wore straw shoes, ragged clothes with patches and holes here and there. Instead of guns, they carried pots and pans. (*Yochi*, male, teacher, 75, focus group #1)

The sight of these dirty, badly disciplined soldiers shattered people’s expectations of the fatherland and their enthusiasm to reunite with their “tongbao.” The KMT soldiers compared unfavourably to the Japanese ones, who had lost the war and were about to be sent back to Japan, but who still displayed great discipline. Indeed, the disappointment was so strong that, as in *Yochi*’s words, “We couldn’t believe our eyes that these were the soldiers of our fatherland! How come the soldiers from fatherland were like this? We did not want to become Chinese!” (*Yochi*, male, teacher, 75, focus group #1)

*Tamu* explained in more detail why people were so disappointed:



Before they came, people had high expectations of the fatherland, but when we saw the soldiers, we felt so disturbed. First of all, unlike the Japanese soldiers we were familiar with, who always dressed in neat uniforms and shiny boots, the Chinese soldiers looked so badly and loosely disciplined, let alone how poorly they were dressed. Second, there was a complete contrast between the defeated Japanese soldiers who were about to be sent back but still were decently dressed and well-disciplined and the Chinese soldiers who won over the Japanese but looked so poorly disciplined. We could not bear to look and we felt ashamed that the Chinese soldiers were from our fatherland. (*Tamu*, male, university teacher, 79, focus group #8).

*Wong* echoed *Tamu* in a different group interview, “Taiwanese people were so disappointed because in the beginning we had great fantasies of returning to the fatherland” (*Wong*, male, merchant, 73, focus group #1).

These hopes were dashed after their first encounter with the Chinese soldiers, which was reflected in how their parents reacted to the reunification with the fatherland after they confronted actual Mainlanders. According to the interviewees, their parents were not as enthusiastic as they had been before the Chinese soldiers came, and they said that the reunification just meant a change in ruler, from Japanese to Chinese, and that it was obvious that the latter would not be better than the former, and perhaps even worse.

People not only felt disappointment, but also contempt at the backwardness of the Mainland Chinese, especially compared to standards on Taiwan, which had become pretty advanced after 50 years of Japanese rule. For example, the Waisheng people had never known electricity or seen light bulbs, neither had they seen faucets and running water, as

revealed in *Tamu*'s and *Yochi*'s accounts in the following. "They never figured out how light bulbs glowed. They thought it was like candles. You blew it and it extinguished," said *Tamu* (*Tamu*, male, university teacher, 79, focus group #8). *Yochi* added,

They thought that water came out automatically from the faucet, so some went to the plumbing store, bought a faucet, attached it to the wall, and expected water to come out. And they never figured out why there was no water coming out. How stupid! (*Yochi*, male, teacher, 75, focus group #1)

*Wong* noted how the locals saw the newcomers. "It was like smart people ruled by fools. We were much more advanced and civilized than them. We despised them, but still had to live under their oppression" (*Wong*, male, merchant, 73, focus group #1).

While these stories about the Chinese may be untrue, the point is that people in Taiwan were willing to believe them, and told and retold them to show how ignorant the Mainlanders were. In addition to revealing the people's deep-seated dislike of the newcomers, these stories are significant in two other respects. On the one hand, they are expressions of people's great disappointment, their disillusionment about the return to the fatherland, and thus their wanting to disconnect with the Mainlanders they encountered. In a sense, whether true or not, these stories provided comfort to people who were undergoing another experience of repression. On the other, these stories also helped to create a space within which the aggressive construction of KMT hegemony was not able to operate. As will be discussed in Chapter 9, such a space was also created by this group separating the language of the home and that of the outside world, and the maintaining of this space was important in helping them to resist the imposition of a Chinese identity. In other words, these stories and

people's actual experiences both represented and drove the early-KMT group's resistance to KMT hegemony and its efforts to impose a Chinese identity on them.

### **Dominance of Waisheng Ren.**

The first encounters were shocking and disappointing, but what really woke people up from the dream of reuniting with the fatherland was the brutal suppression and unfair treatment from the Mainland Chinese. After the Retrocession, the difference between Waisheng and Bensheng became increasingly apparent. The dominance of Waisheng Ren was gradually established, yet tensions between the two ethnicities were also building. The early-KMT group mentioned how Waisheng people often bullied and oppressed the Taiwanese. *Mishi*, for example, recalled his parents describing how different society became after the Chinese arrived. "They occupied the properties left behind by the Japanese and robbed civilians of their belongings. Policemen requested 'protection money' from people. Instead of protecting people, Chinese soldiers bullied people" (*Mishi*, male, teacher, 80, focus group #12). *Tamu* and *Shinn* had similar memories about the corruption of the Waisheng policemen. *Tamu*'s sister ran a small store, and policemen would come to collect bribes on important holidays. In *Shinn*'s memory, "The Chinese police were way different from the Japanese police. They wanted bribes, but avoided their duties" (*Shinn*, male, business owner, 74, focus group #3). People's experience of living with Japanese policemen offered them a comparison which made it even more difficult to accept the new situation. *Penny*, born in 1962 and from the peak-KMT group, recalled that her parents had positive impressions of the Japanese, as they were able to maintain a secure society, "They [parents] used to say that Japanese set up many regulations, but they ensured people's

security as long as the rules were obeyed. Under the Chinese rule, the society was a very different scene” (*Penny*, female, businessman, 48, focus group #6).

What disappointed the Taiwanese people was not only the sharp contrast between the Japanese and Mainland Chinese, but the dominance of the Waisheng Ren over them. As remembered by the participants, ever since the arrival of the Mainland Chinese, almost all important positions in the government were given to Waisheng Ren, with the Taiwanese having little chance of getting a governmental job or becoming an official. Compared to the end of the Japanese era, when half of the members of the provincial council were elected by the people, moves to increase local authority and autonomy were reversed as the KMT opted for greater centralization of government power (“Taiwan jianshi—Zhenghua minkuo [Brief history of Taiwan—Republic of China], 2004). Similar situations happened with other governmental enterprises, in which Taiwanese people were demoted so that the higher positions could go to Mainland Chinese, who, according to the interviewees, often did not know much about what they were supposed to be doing, but instead only got the positions because of their ethnic identity. The government was notorious for its inefficient bureaucracy, nepotism, and corruption. Soldiers were poorly disciplined, robbing, bullying, cheating, raping, and taking advantage of people everywhere (“Taiwan jianshi—Zhenghua minkuo [Brief history of Taiwan—Republic of China], 2004). In the eyes of the locals, all of these were in sharp contrast to the orderly behaviour of the Japanese.

### **Role of Newspapers**

These aspects of the encounters, however, did not receive much attention in the newspapers, which told a very different story to that seen in the testimony of the

interviewees. Instead of mentioning the ragged, poorly-disciplined, and defeated soldiers, newspapers represented the reunion with headlines like, “Taiwanese people’s enthusiasm to reunite with fatherland” (“Qianwan ren dengdai zhe yimu [Anticipation of Taiwanese people for the day],” 1945, p. 3) and “Taiwanese people’s great passion in learning Mandarin” (“Tuixing guoyu wenti [The issue of Mandarin promotion],” 1945, p. 2). This response was not surprising, considering that media had a key role in helping legitimate the new government, and so many things were omitted from official accounts in order to aid the construction of KMT hegemony and Waisheng dominance. These omissions were easily achieved, as the media was completely controlled by the KMT, with only authorized representations appearing in the press, and more problematic accounts being censored. In the midst of the worsening situation of losing the Mainland to Mao Zhe-dong’s Communist Party and losing the trust of local Taiwanese people after the 228 Incident, which will be discussed later, the KMT felt an urgent need to establish its hegemony and, what is more, have the Taiwanese people accept it.

As Anderson (2006) and Billig (1995) argue, the media and printed materials have an essential role to play in supporting the construction of nationhood and controlling the idea of a national community. Small, banal words, as Billig (1995) contends, “jingling in the ears of the citizens, or passing before their eyes” (p. 91) are required for the flagging of homeland and the imagining of a nation, which are essential to the construction of hegemony. The media thus helps create the nation-state as something with a permanent existence, and inscribes in people a sense of national identity. In an era when the new government was desperate to impose a new national identity on the Taiwanese people, newspapers constantly sought to inspire a sense of belonging and nationhood via appeals to the population to

de-Japanize, to see Taiwan as Chinese, and to differentiate “we” from “they,” with the former being Chinese and the latter being Japanese.

### **De-Japanization.**

At the change of regimes, removing the Japanese influence on Taiwan and turning the population into good Chinese citizens were two key tasks that the KMT set out to achieve. The new government thus worked on de-Japanization and Sinification of the locals. Fifty years of Japanese rule had made Taiwan a more advanced society than the Mainland in all aspects, including education, transportation, and the economy, which accounted for some of the Taiwanese people’s disappointment with the new arrivals from the Mainland when they actually encountered them. However, in the eyes of the new rulers, the Taiwanese people had been enslaved by an alien regime, and this had turned them into nationals of an enemy country, and thus tainted their Chinese identity. The first aim of the KMT was, as an editorial published two months after the Retrocession noted, to rid the Taiwanese people of their Japaneseness and to help them resume their Chineseness. As stated in an editorial titled “Renshi benguo yu taiwan [Knowing our country and Taiwan]”:

After fifty years under Japanese rule, Taiwanese people’s impression of the fatherland became vague, although in spirit they were never disconnected with it. Taiwanese people were ignorant of the history of our nation, especially the history of the past fifty years, including the nationalist revolution, and the war against Japan. (“Renshi benguo yu taiwan [Knowing our country and Taiwan],” 1945, p. 3)

To achieve de-Japanization, newspapers that were published in Japanese were ordered to stop and be replaced by Chinese ones in 1946. Taiwanese intellectuals and elites who

used to use Japanese and knew little or no Chinese suddenly became illiterate (“Taiwan jianshi—Zhenghua minkuo [Brief history of Taiwan—Republic of China],” 2004). As Bensheng Ren did not know Mandarin but did know Japanese Kanji (Sino-Japanese characters), the Chinese Phonetic System was taught in elementary schools to help them read the new language. The *Mandarin Daily News* started publication in this era, along with several other newspapers, and it annotated the Mandarin characters it used with a phonetic system, “Zhuyin Fuhao,” so that it could be used more as a language learning aid than a source of news. Launched in 1948, it became very popular among schools and students.

In newspapers the positive influence that Japan had on Taiwan was completely ignored, and instead they mainly emphasized the enslavement of Taiwanese people under colonial rule, and thus the urgent need to uproot Japanese influence in order for people to resume their long-lost Chineseness. An editorial published in *Taiwan Xin Sheng Daily News* was typical of such discussions found in the newspapers after the Retrocession. It asked that the Taiwanese people “make immediate efforts to get rid of Japanese habits and customs, now that Taiwan was Chinese once again.” The newspaper criticized people for not working hard enough to uproot Japanese influences, complaining that Japanese was still heard in many places and Japanese customs still practiced:

It has been two months since the Retrocession. Two months is not a long period, but it is also not too short to remove the Japanese influence if people have the determination to do so. We truly feel people need to make greater efforts. (“Xiwang taibao gaige jijian shi [Correcting the habit of using Japanized terms],” 1945, p. 2)

On the one hand, newspapers represented people as eager to get out of Japanese control, but on the other hand also attacked them for not making enough effort to do so, with an obvious contradiction between the two positions. Reading between the lines, it can be supposed that perhaps people were not as eager to abandon their Japanese history as the media claimed. Actually, as noted in the previous chapter, many Taiwanese people did hope for an end to the Japanese colonial rule before the Retrocession. However, the reality of Chinese rule, and the comparisons that were easily made with Japanese governance, made people less eager to become Chinese again. Newspaper representations of people's desire to escape Japanese control can thus be read as propaganda, simple reports that covered a more complicated truth. In this way, such representations aided the construction of the KMT's hegemony.

### **Knowing Taiwan.**

During this period, with a view to building KMT hegemony, newspapers avoided making the comparison between pre- and post- Retrocession Taiwan, but when they did, they took an unusual perspective. Instead of acknowledging Japanese achievements in developing Taiwan, they pointed out that it was "wrong" to make the comparison without applying "the correct" standards. A Chinese standard, rather than a Japanese one, should be adopted to look at Taiwan, as "Taiwan was Chinese, not Japanese anymore" ("Ruhe kan taiwan [The right perspective to look at Taiwan]," 1946, p. 2). This same editorial advocated "knowing Taiwan in the correct perspective." The fact that the situation in Taiwan was deteriorating after the Retrocession was actually acknowledged, but what was emphasized was that "Taiwan's situation was not actually bad if compared with other Chinese provinces, and that any intention to comment on Taiwan's present situation should



be made based on the concern that Taiwan was Chinese, so that Japanese standards no longer applied” (“Ruhe kan taiwan [The right perspective to look at Taiwan],” 1946, p. 2).

According to the newspaper, applying the wrong standard to look at Taiwan was blamed for the “misconception” that it was more advanced than other Chinese provinces. Since a correct comparison would be between Taiwan and other Chinese provinces, the same article then argued that the current problems in Taiwan were not any worse than those in other provinces. Further, the situation in Taiwan was actually getting better, if the issue were examined from “the right angle,” because “Taiwanese people had changed from being ‘the enslaved’ to ‘masters’.” (*Ibid.*)

However, what was “seeing Taiwan in the correct way”? In fact, it was just seeing Taiwan based on the ruling party’s interests, and thus it was a form of hegemonic discourse.

With a view to Sinicizing Taiwan, newspapers on the one hand purposely ignored the advances that occurred under Japanese rule to fit the narrative into the frame of Taiwan just being “one of China’s provinces,” and on the other emphasized the Taiwanese people’s improved status, from being enslaved under colonialism to becoming masters of themselves with the arrival of the KMT. However, equating Taiwan with other Chinese provinces only reminded many people that things had been better under Japanese rule. With the growing dissatisfaction in people’s minds about the great differences between the two regimes, the gap between official and public attitudes widened, and eventually led to the 228 Incident.

#### **Advocacy of Chinese nationalism--Us-them distinction.**

Advocacy of Chinese nationalism was ubiquitous in the newspapers. The distinction between “we” and “they” was first created for the purpose of de-Japanization and

Sinification. Newspapers represented the Japanese side as negative, with an emphasis on their oppression. Meanwhile, they appealed to the Taiwanese people to follow Chiang Kai-shek's instructions to return good for evil in treating the post-war Japanese nation, saying that such magnanimity was a traditional Chinese virtue. *Taiwan Xin Sheng Daily News*, for example, in a report titled "Jianshe sanmin zhuyi xin taiwan [Planning new Taiwan under Three Peoples' Principles]" claimed that it was those in charge rather than ordinary people that should be blamed for the war and colonialism. Besides, "an eye for an eye" was not what "we Chinese people" should do, who instead, "should treat Japanese people with sympathy and equality" ("Jianshe sanmin zhuyi xin taiwan [Planning new Taiwan under Three Peoples' Principles]," 1945, p. 3). An article from the next day, titled "Gao zaitai riben ren [To Japanese people in Taiwan]", on the one hand re-emphasized that ordinary Japanese people were "deceived, oppressed, ignorant and pitiful," and pleaded with the Taiwanese to follow Chiang and not wish harm on them. On the other hand, it asked the Japanese people in Taiwan<sup>5</sup> to be aware of their own status and situation, and to behave themselves ("Gao zaitai riben ren [To Japanese people in Taiwan]," 1945, p. 7).

Clearly, "they" as "the bad" and "we" as "the good" were differentiated, with Taiwan belonging with "they (i.e. the Japanese)" in the past, but with "us Chinese" now and in the future. In this way, a shared national community was imagined for Taiwan and the Mainland at this stage. This "we as Chinese," however, later developed to become a

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<sup>5</sup> According to a survey conducted by the Taiwan Governor-general Office in October, 1945, of the more than three hundred thousand Japanese in Taiwan, one hundred and forty intended to stay, while one hundred and eighty wanted to go back to Japan. Due to the fact that the KMT government needed Japanese who had certain vocations, such as teachers, business owners, technicians, and so on, to help enable a smooth transition, in April 1946, the government ordered that all Japanese had to be sent back except for about twenty-eight thousand of them, who got permits to stay due to their employment in the government or other key institutions (Y. Xu, 2005).

“we-they” distinction between the locals and the Mainland Chinese, when the relationship between the two groups got increasingly tense.

In addition to producing a “we-they” distinction, newspapers also made frequent attempts to encourage a new national identity. Small banal words, just as Billig argues, are required for the flagging of homeland and the imagining of a nation, both of which are essential for the construction of hegemony. For instance, the use of the term “fangyan [dialect]” for the Taiwanese language and “guoyu [national language]” for Mandarin banally flagged this aspect of nationhood, in an effort to promote the new language. In an editorial titled “Guoyu wenti [Mandarin issue]”, *Taiwan Xin Sheng Daily News* stated that:

Taiyu is one of the Chinese languages, a dialect spoken in many areas in addition to Taiwan...But we should all learn Mandarin, our national language. Not only Taiwanese people have to learn it, but also people of other provinces. (“Guoyu wenti [Mandarin issue],” 1945, p. 2)

The clear message here was that people had to learn Mandarin “because we are of one nation.” An article from another date also spoke of Mandarin as “representing the nation”:

Promoting Mandarin does not mean dialects have to be wiped out. Why? Because Mandarin itself was also a dialect before it was made into the national language due to its qualifications to be a lingua franca. With this national language, other dialects can still be used in their local areas, which in fact help to promote Mandarin. (“Huiyu taiwan hua yingyou de diwei [Restore the status of Taiyu],” 1946, p. 2)

The links between “Taiwan” and terms such as “our nation,” “inside the province,” and “outside the province,” also highlighted the importance of the homeland and the idea of nationhood. In an editorial mentioned earlier (“Renshi benguo yu taiwan [Knowing our country and Taiwan],” 1945, p. 3), words like “fatherland” and “history of our nation” were used, and the Taiwanese people’s vague sense of national identification was cautioned against.

These banal nationalist representations also included reporting on things that happened in Taiwan and other Chinese provinces as local or national news, which often covered two or three pages in papers that usually contained only around four or five pages. On March 2, 1947, for example, *Central Daily News*, had pages 2, 3, and 5 dedicated to news from Taiwan and from the rest of the nation, and page 4 to international news. On February 23, 1948, local or national news was on pages 1, 2, and 4, and international news on page 3. In this way, newspapers constantly tried to remind the Taiwanese people that they were now Chinese.

Moreover, the newspapers’ use of terms like “fatherland” and “national language,” as well as its emphasizing the “us China vs. them Communists” distinction kept reminding people that they were now part of a greater homeland. Newspapers from this early KMT stage were full of such words and themes, all of which were used to advance the construction of KMT hegemony.

### **Role of Language Policy**

The implementation of the Mandarin-only policy was a key step in the KMT’s project of hegemonic construction. With the promotion of the dominance of Mandarin over other

languages, the policy also strengthened the dominance of Chineseness over Taiwanese, and Waisheng Ren over Bensheng Ren. However, in practice, the promotion of the monolingual policy was a significant challenge for the KMT, because, as mentioned earlier, Mandarin was spoken by only a small number of people, most of whom had recently arrived in Taiwan, and it was almost unintelligible to most of the population. In other words, there was no natural environment for learning the language, and thus various strategies were adopted to encourage this, such as using Taiyu to teach and learn Mandarin. Efforts such as these normalized the learning of Mandarin, and thus made the hegemonizing process invisible to many people. In the end, the adoption of Mandarin was justified by its being the “national language,” while those spoken by the majority of people were only “dialects,” and thus the dominance of the new language and the new administration were both enforced together.

### **Learning Mandarin via home languages.**

As mentioned earlier, during the very early period at the turn of regimes, the KMT’s educational planning had two priorities, de-Japanization and Sinification. The Mandarin-only policy, which was extended from Chen-Yi’s experience governing Fujian, was put into effect to achieve these two aims. In Chen’s plan, the Mandarin movement would be completed in Taiwan within four years (X. Xu, 1991). In the early years of the policy, preserving the use of dialects to facilitate Mandarin learning was proposed, and during this short period of two to three years (1945-1948), Taiyu and other vernaculars were viewed as Chinese dialects, although with different statuses to that of Mandarin. Indeed, other than the distinction between “dialect” and “language,” the various home languages in use in Taiwan were not seen negatively at this stage, probably due to the need of it to help

people learn and then teach Mandarin. However, one of the reasons for this relatively relaxed policy may have been the enthusiasm for learning “the language of fatherland” that many Taiwanese people displayed immediately after the Retrocession, and thus the KMT perhaps did not see the local languages as posing a threat to the promotion of Mandarin. Besides, the use of dialects was seen as necessary to promote the learning of Mandarin, which was an essential step to ridding Taiwan of Japanese influence.

An examination of both journals and newspapers reveals that the idea of revitalizing the use of dialects was advocated in support of the greater state policy. For example, He-Rong, one of the pioneer activists of the Mandarin campaign, argued in an article titled “Bensheng de guoyu yundong [Mandarin movement in Taiwan province]” in *Taiwan Jiaoyu Fudao Yuekan* (*Taiwan Education Report Monthly*) that:

The meaning of Mandarin campaign, to the whole nation, lies in its being a language standardization movement; to Taiwan province, lies in the revitalization of Chinese language and heritage... Learning Mandarin via dialects requires only standardization of sounds, while learning Mandarin via Japanese means learning a completely new language. (He, 1950, p. 29)

Official narratives of this stage were thus friendly to home languages. Newspapers may have represented Mandarin as the national language, and all the other ones as dialects, but they also reassured people that the promotion of Mandarin would not threaten their home dialects. *Taiwan Xin Sheng Daily News*, for example, published an editorial on November 8, 1945, that read: “Mandarin is our national language, a language we should all know. The government will not ban the use of Taiwanese, or even try to extinguish it, because it is also

a member of the Chinese language family” (“Guoyu wenti [Mandarin issue],” 1945, p. 2). The next year, on May 28, 1946, Wei Jian-gong, the first head of the Mandarin Promotion Council, who advocated promoting Mandarin via dialects, published an article titled “Heyi yao tichang cong taiwan hua xue guoyu [Why do we advocate learning Mandarin via Taiwanese language]” in the same newspaper. In the article, preserving home languages and promoting Mandarin were set out as two key tasks after the Retrocession, with the explicit aim being to reconstruct a sense of national identity in Taiwan (Wei, 1946). According to the article, people needed to understand that learning Mandarin was important not only for communication, but also, and more importantly, because it linked the Taiwanese people to the Mainland. However, home languages were also seen as useful, because they linked people to Mandarin, and hence the nation. Note that although the media was friendly to the home languages, due to the state policy, newspaper representations wanted people to accept two things—that such languages were “dialects,” and that their primary function was to support the nationalistic status of Mandarin. In other words, in the minds of the Taiwanese people, the accommodation of home languages was paired with the internalization of the superiority of Mandarin compared to Taiyu, the main home language.

The seemingly harmonious relationship between Mandarin and the various dialects lasted only a short time, because, as mentioned above, the unequal status of the vernaculars when compared to Mandarin was clear from the very beginning. This is not surprising, as how could the dominant group treat the language of the people they were subordinating as equal? From the very beginning, the distinction between the home languages and Mandarin was sharply made in the use of the terms “dialects” and “national language,” and this only

became more apparent in the next stage of the government's language policy. The accommodation of home languages was thus only superficial.

*Normalization of Mandarin-only policy.*

As mentioned earlier, for the majority of the population who spoke Taiyu, Mandarin was a completely new language. Therefore, in order to get people to ignore or overcome the difficulties of learning a new language, it was necessary to make the adoption seem as natural and unproblematic as possible. In this regard, "empowerment" was the key word in the normalization of the Mandarin-only policy. In interviewees' accounts, parental attitudes toward the new language clearly revealed their desire to learn it to obtain a better life. Just as most people accepted the change of regimes quietly and passively, so they did with the new language that came with the KMT government. As with the learning of Japanese under the earlier National Language Family policy, people adopted Mandarin mainly because it was the language of power, and thus was associated with many benefits and privileges. For parents, the key point was that learning the new language was a way for their children to have more opportunities and better futures. With many of the older generation being illiterate themselves, they also saw learning Mandarin as the only way for their children to become literate.

Those who grew up in this stage commonly mentioned the desire for empowerment as they spoke of their parents' attitudes toward their learning Mandarin at school. As *Wong, Yochi, Shinn* and others remembered, their parents, who were themselves illiterate, saw schooling as a way for their children to have a better future, and so they wanted them to learn diligently everything the school taught them. Besides, their parents were too busy working



to actually have time to closely monitor their children's school work. As *Wong* said, "Our parents did not have specific positions as to language. They thought whatever the school taught was good for our future" (*Wong*, male, merchant, 73, focus group #1). *Wong's* memory was echoed by *Yochi*, who said, "They wanted us to learn whatever school taught us. They never questioned school or teachers or what they taught us. They were busy earning a living and did not have time to mind our school work" (*Yochi*, male, teacher, 75, focus group #1). These attitudes were the same as those in earlier years when their children had to learn Japanese.

Just as in the construction of Japanese hegemony, the benefits and advantages linked with using the new language were a strong incentive behind the adoption of Mandarin, and thus the KMT's normalization of the policy. That is to say, the adoption of Mandarin was not "natural" at all, but instead built on the desire for empowerment, which sometimes was so strong that severe punishments did not seem to be necessary to ensure that the language was learned. In this sense, how the participants remembered the related punishments testified to the normalization of Mandarin in Taiwan. According to the interviewees, their teachers did not actually enforce the Mandarin-only policy very strictly, and few remembered being punished for speaking Taiyu in class. With both children and their parents fully realizing the advantages associated with learning the dominating language, they complied with the policy in order to accumulate cultural, social, and economic capital, and thus strict punishments were not needed. In *Mishi's* memory, although speaking Taiyu at school did invite punishment, this was much less severe than that meted out for speaking it in the Japanese era (*Mishi*, male, teacher, 80, focus group #12). *Wong* remembered being at school before 1949, before the "no speaking dialect" policy was strictly enforced, so that his

home language was still used a lot (*Wong*, male, merchant, 73, focus group #1). *Yochi*, who later became a teacher, had similar memories, and commented that the policy was enforced more seriously when he was a teacher in the mid-1950s than when he was a student in the early years of KMT rule. He also emphasized that although the policy was not strictly enforced, he and his classmates “naturally” used Mandarin at school, as it was the language of education, “Although there were no strict punishments when I was a student, we naturally used Mandarin in class. We naturally learned it, because we wanted to pass the exams and we wanted education” (*Yochi*, male, teacher, 75, focus group #1).

### **Role of Schools**

#### **Mandated curriculum.**

In the construction of hegemony, schools were important sites where not only the monolingual language-in-education policy was enforced to help perpetuate the dominant discourse, but also the mandated curriculum. As the early-KMT group testified, at school they learned about people and things from far away and long ago, while nothing about the land under their feet was being taught. All subjects focused on China, with Chinese history, geography, literature, and culture, and thus a Chinese racial and national identity was fostered and imposed on them. As *Wong* commented, “We knew all the great rivers and high mountains of China. We knew the five thousand years’ history of China. We knew the Mainland much better than we knew about the land we lived in” (*Wong*, male, merchant, 73, focus group #1). *Ji* further stressed in a different focus group interview, “We were always told that we were Chinese, and we should be ‘righteous Chinese people’” (*Ji*, male, technician, 67, focus group #3).

In this way, the curriculum fostered the idea that “we are all Chinese.” In creating Chinese dominance, the curriculum also suppressed a local Taiwanese identity, which became the “Bensheng” identity. Later, during the stage when hegemony was more actively established, the “Bensheng” identity was represented negatively in order to ensure the dominance of the “Waisheng” one.

### **Practical difficulties in Mandarin learning.**

As mentioned in the previous section about the role of language policy in constructing the KMT’s hegemony, the normalization process neutralized the un-naturalness of promoting Mandarin in a place where most people did not speak it, and made the monolingual policy appear unproblematic. However, the practical difficulties that interviewees experienced in their learning Mandarin at school, such as the lack of teachers, especially good ones, at the beginning of this policy, did testify against the normalness of the policy, and thus showed the difficulties the KMT faced trying to build Mandarin dominance among the population. However, such accounts also showed that these practical difficulties did not actually translate into resistance against learning Mandarin, or become barriers to normalization. The establishment of KMT and Mandarin hegemony was always the goal of schooling at this time, and it was achieved despite the obstacles to it.

### ***Shortage of teachers.***

At the early stage of the monolingual policy, a severe shortage of Mandarin teachers was the first serious problem that KMT encountered. To deal with this, the government recruited about 200 teachers from Beijing and the coastal provinces to join the locally born

teachers (M. Chen, 1998). However, most of the latter did not know Mandarin at all, and had to receive intensive training before they could teach it.

The teacher shortage raised problems of both quantity and quality. Local Taiwanese teachers did not know Mandarin, while those from the Mainland usually spoke it with heavy and varied provincial accents, which made them hard to understand. In addition, in an editorial titled “Dangqian taiwan jiaoyu zhu wenti [Several problems in Taiwan’s current education]”, *Taiwan Xin Sheng Daily News* pointed out that there was a severe shortage of teachers because “native Taiwanese teachers are ignorant of the knowledge of the culture and language of fatherland...Waisheng teachers are not even qualified for teaching” (1947, p. 1).

Similar comments were found in the professional journals that later reviewed the Mandarin campaign of this era. For example, an article in *Taiwan Jiaoyu Fudao Yuekan* (*Taiwan Education Report Monthly*) noted:

During the first years of the Mandarin campaign, the number of teachers, including those recruited from coastal provinces and those native Taiwanese, was one thousand at most. The former spoke Mandarin with different accents; the latter knew nothing about Mandarin and Chinese. Both of the groups were in urgent need of Mandarin training. (He, 1950, p. 29)

A bigger budget for training Mandarin teachers was proposed as the solution, since the problems related to both the quantity and quality of teachers were attributed to the government’s failure to take care of the teachers’ living standards, so that they could not be fully dedicated to their work. *Taiwan Xin Sheng Daily News*, for example, had an editorial

titled “Jiaoyu shang de jige wenti [Several problems in education]” that referred to raising teachers’ pay as “the key to solving the problem of teacher shortages” (1947, p. 2).

***Learning Mandarin with difficulty.***

The poor quality of teaching made it more difficult for the students to learn Mandarin, which also reflected the practical difficulties in building Mandarin dominance, as vividly remembered by *Wong*:

I had a friend from elementary school who became a teacher later. I knew he could not speak any Mandarin. He learned from a person in our village who knew literary Chinese and Mandarin, and then taught his students what he learned from his tutor the day before. (*Wong*, male, merchant, 73, focus group #1)

This view that teachers often taught what they themselves had just learned was confirmed by many of the interviewees, including *Shinn, Yo, Daisy* and *Yochi*. Moreover, sixteen years later, *Jiaoyu Wenzhai (Education Digest)* made similar comments when it reviewed the early phase of the Mandarin campaign in an article written by a legislator, Hong Yan-Qiu, which noted:

After the Retrocession, those recruited from the Mainland to teach Mandarin spoke with various accents, and their Mandarin was not standardized. As for Bensheng teachers, they knew nothing about Mandarin and Chinese, let alone teaching them. Most of them had to take intensive Mandarin courses, and they often taught students what they had just learned the day before. (Y. Hong, 1966, p. 3)

Consequently, although Mandarin was the official language of education after the Nationalists came, during the transitional years of the Mandarin-only policy, home languages

were not completely banned based on the state policy of “dialect vitalization.” *Shinn* mentioned that implementing the monolingual policy was difficult for those teachers who did not know Mandarin at all:

After the policy was launched, teachers started teaching Mandarin. It was very difficult, though, as they did not know how to teach a language they did not know, and we did not understand what they taught. Sometimes they used Taiyu to help us understand. (*Shinn*, male, business owner, 74, focus group #3)

Similar comments were made by *Yo* and *Wong*. “In the beginning we needed the teachers’ Taiyu translations to help us learn Mandarin,” said *Yo* (*Yo*, female, homemaker, 70, focus group #3). “When I entered elementary school, our teachers taught us Mandarin in class, but they used Taiyu to explain what they were teaching,” recalled *Wong* (*Wong*, male, merchant, 73, focus group #1).

Besides the practical need for teachers to use Taiyu to teach Mandarin, the revitalization of dialects was also implemented because the new government wanted to rid the islanders of Japanese influence and replace it with a Chinese identity. Dialects thus functioned to bridge the gap between the alien language, Japanese, that the islanders were familiar with, and the language of the fatherland that they did not know at all. Z. S. Lin (1992/ 2011) affirmed the contribution of the dialect revitalization policy to his Mandarin learning, which later he also confirmed in a personal interview with the researcher. Born in 1929, his Japanese was more fluent than his Taiyu, but still the latter helped greatly when he started learning Mandarin. According to Mr. Lin, he was worried that he might never be able to acquire Mandarin when he started the learning at the age of 16 or 17. However, later he

found the transition from Japanese to Mandarin not as difficult as he had expected, with the help of his Taiyu. Lin's experience of transferring from Japanese to Mandarin was echoed by others, like *Mishi*, who mentioned that Mandarin was not very difficult to learn, as he used Taiyu to help in this process (*Mishi*, male, teacher, 80, focus group #12).

Nevertheless, even with the aid of home languages, the early-KMT group still experienced some difficulties learning Mandarin. Part of what made this difficult was that they did not start learning it immediately after they entered school. Instead, they started when they were at Grades 5 or 6, or even older. Compared to people who started Mandarin at a younger age, it is perhaps not surprising that those who had already received a Japanese education faced certain problems, and also felt some resistance. Five of them mentioned their difficulties learning Mandarin, while four did not remember having any problems. However, it seemed that even for those with difficulties, their problems were not so great as to make them resist learning the new language. *Mishi*, for example, did not start learning Mandarin until he studied in teachers' college, at the age of about 17, in the late 1940s. Mandarin frustrated him at the beginning, and he found it more difficult than other subjects to manage. But he noted in the interview that in the end Mandarin was not actually that difficult to learn:

I started learning Mandarin after I entered teachers' college. I always failed the Chinese tests as I knew nothing about Mandarin. I got full marks in math, but almost zero in Mandarin....But little by little, I learned to speak Mandarin. Mandarin was not very difficult to learn. (*Mishi*, male, teacher, 80, focus group #12)

*Tamu* is another a person who started learning Mandarin at about *Mishi*'s age and experienced more difficulties in his Mandarin pronunciation. In contrast to *Mishi* and *Tamu*, *Wong* seemed to have experienced no difficulties, as he felt that he learned Mandarin naturally. *Yochi*, who is about the same age as *Wong*, thought that with the training he received in teachers' college Mandarin was not very difficult, and noted that college graduates were able to speak better Mandarin than other people (*Yochi*, male, teacher, 75, focus group #1). *Manny*, who was the youngest of this age group and had no experience of learning Japanese, started learning Mandarin right after she started school, and also remembered no specific difficulties with the language (*Manny*, female, teacher, 70, focus group #12).

According to the interviewees in the early-KMT group, apart from any difficulties that they associated with the age when they started learning Mandarin, the main problems that they perceived were related to poor teaching quality. *Daisy*, for example, mentioned that their teachers had to take intensive courses to learn Mandarin before teaching them, and blamed the bad teaching for the "Taiwanese Mandarin" (Mandarin spoken with a Taiyu accent) that people of her age spoke, "Most of our Mandarin teachers were Taiwanese. They taught us what they just learned the day before. That is why people of our generation could not speak standardized Mandarin" (focus group #8, October 4, 2010). Similar views were shared by *Yo* and *Yinno*. *Shinn* commented that not only did the Taiwanese teachers' accents had a negative influence on their Mandarin pronunciations, but also that the teachers recruited from the Mainland were not qualified to teach Mandarin either. He remembered them speaking Mandarin with heavy dialectal accents that were extremely difficult to



understand. To help him pass the Mandarin exam, his mother had to find a better Mandarin tutor for him (*Shinn*, male, business owner, 74, focus group #3).

These common memories show that for those people who had received Japanese elementary or higher education, the transition to Mandarin in their early or mid-teens was not easy, especially since qualified teachers and good instruction materials were not available. Overall, what is notable about their Mandarin learning experience is *Wong's* comment that “all of us learned it naturally, without a second thought” (*Wong*, male, merchant, 73, focus group #1), which indicates that the practical difficulties in teaching and learning Mandarin that arose due to the effects of normalization and hegemonic construction, did not really hinder the establishment of Mandarin dominance among this generation.

One thing worth noting here is that noticeable gender differences do not show up except when respondents complained about their inability to speak standard Mandarin. Given the fact that most discussions that happened in this cohort were gendered, as male participants dominated by speaking more frequently than the female ones, the fact that only women's voices were heard on this issue makes this gender difference a significant one. The women more so than the men distinguished two levels of Mandarin, with the good one represented as standardized Beijing Radio Mandarin, and the inferior one as the Taiwanese Mandarin. Women seemed to have a stronger desire to speak good Mandarin, which may have reflected their easier adoption of the hegemonic values that superiorized Mandarin. It may also have reflected their understanding that to succeed in school or get a job, as a female, required Beijing Rodio Mandarin.

## Growing Conflict

The normalization of Mandarin as the language of power and of education took place in the context of growing hostility toward the KMT and the privileged Mainland Chinese. Ill feelings toward the newcomers accumulated, and turned the initial passion for reunion into two increasingly separate ethnic groups. The anti-Waisheng sentiment resulted from mutual cultural misunderstandings, long-term discrimination and suppression by the more privileged Mainland Chinese.

In public and private institutions, Waisheng Ren occupied higher positions that originally were held by Taiwanese people. In addition, most of government positions were also occupied by Mainlanders. Those interviewees who had lived under the Japanese rule, such as *Tamu* and *Daisy*, recounted the discrimination that was carried out against the Taiwanese by the Mainland Chinese. As mentioned earlier, what outraged people even more about Mainlanders dominating these jobs was that many of them were incompetent, with their only qualification being their Waisheng identity. As *Tamu* described the situation, “So it became those in charge, the Mainlanders, knew nothing about a trade, while those who really knew the trade, the Taiwanese, became employees. It was ridiculous” (*Tamu*, male, university teacher, 79, focus group #8).

Ridiculous as it was, Taiwanese people could do nothing about the situation, and thus their bitter feelings continued to grow. As a result, the initial idea of a shared national community, in which “we were all Chinese” based on a common culture, gradually developed into sharp distinctions between the two groups, “Bensheng Ren” and “Waisheng Ren,” similar to the distinction between Taiwanese and Japanese in the colonial era. As

Waisheng dominance increased, this further raised the tensions between the two groups, as will be seen in the following chapter.

### **Tensions in School**

Ethnic tensions not only built up in the wider society, but also in school. Taiwanese and Mainland children did not have much contact with each other except at school, due to the fact that many second generation Mainlanders lived separately in the military communities, speaking Mandarin and adopting different cultural practices from local Taiwanese people. The interviewees recalled the ethnic composition of their schools, and how students got along with each other. The results show no gender difference or urban/ rural one, as participants generally did not have experiences of studying with Waisheng children. In many cases, there were no or few Mainland children in their school. In *Wong's* class, however, there were both Bensheng and Waisheng students, and they did not get along well. *Wong* remembered that Taiwanese kids did not like the second generation Mainland Chinese, and that the ill feelings toward Waisheng Ren were passed on to them from their parents who had suffered unfair treatment, and who often used vulgar language to refer to them. He said that there would have been some serious fights between the two groups if not for the strict school regulations (*Wong*, male, merchant, 73, focus group #1). *Yochi* also mentioned that Bensheng and Waisheng students in his class sometimes had arguments, but they did not fight, because, "if we did, our teachers would give us severe punishments" (*Yochi*, male, teacher, 75, focus group #1). As *Wong* said, their ill feelings for Waisheng students generally came from their parents, and so the tensions at school were actually a reflection of the tensions in society as a whole. As will be discussed later, these tensions increased during the following period, as the gradual construction of Waisheng dominance continued.

## **The 228 Incident**

As noted by the interviewees, the peace the Taiwanese hoped for with the Retrocession did not occur, and instead Taiwan was plunged into greater chaos with the change of regime. Disappointment in the Chinese Nationalists, coupled with cultural misunderstandings and widespread corruption, served to further escalate the tensions between Bensheng and Waisheng into acts of ethnic hostility on both sides. After one year of the KMT's rule, people's resentment and hatred reached a climax, and what in 1947 became known as the 228 Incident provided an outlet for these feelings.

When the 228 Incident happened, all the accumulated disappointments and complaints against the new government suddenly exploded, escalating a relatively small security incident to an island-wide social movement against both the government and the Waisheng as a whole. The 228 Incident played an essential role in the KMT regime's construction of hegemony, as it led directly to the imposition of martial law, strict enforcement of a Mandarin-only policy, and the issuing of a state-controlled curriculum.

The causes of the 228 Incident were complex, but a large part, as stated above, had to do with people's long-standing anti-government sentiments. The catalyst was a dispute between a cigarette vendor and a Mainland Chinese agent of the Monopoly office that arose in Taipei on February 27, 1947. The female vendor was hurt by the agent and his colleagues, which prompted the surrounding Bensheng crowd's anger. They chased the Chinese agents, who in the process fired their guns into the crowd and killed an innocent bystander. This led the crowd to call for the arrest and trial of the agents, but received no response from the government. The following day, angry mobs burned down buildings and

attacked Waisheng Ren. Civil disorder and open anti-government rebellion lasted for days. In the midst of the chaos, the government declared martial law, using troops from Fujian province to put down the uprising, causing the death of many civilians.

In the aftermath, instead of trying to mend the previous wrongs, the KMT launched a violent and brutal island-wide crackdown. By March 1947, thousands of civilians had been killed by the troops. Besides random killings, systematic massacres were also launched, targeting Taiwanese intellectuals and elites, as well as a large number of Taiwanese high-school-aged youths. The initial purge developed into a massacre, followed by a period of repression termed “the White Terror” that lasted 40 years (“Taiwan jianshi—Zhenghua minkuo [Brief history of Taiwan—Republic of China],” 2004).

The people who witnessed the 228 Incident vividly remembered it years later. *Tamu*, *Yinno*, *Daisy*, *Shinn*, *Yo*, and *Mishi*, for example, saw the arrest and brutal killing of members of the Taiwanese elite in the aftermath of the incident. *Tamu* and *Yinno* remembered the execution of a lawyer in the city they lived in, with the scene still stuck vividly in the former’s memory:

I saw the executed lawyer on a jeep riding around the city, with his two hands tied behind his back, before he was sent to the place for execution. The terrifying music the trumpeter played right before the execution lingered in my memory vividly, even until today. That scary scene was something I would never forget in my life. (*Tamu*, male, university teacher, 79, focus group #8)

*Yinno* echoed this by saying, “I saw the dead body of the executed lawyer lying there in what is today the memorial park named after him...I was so terrified” (*Yinno*, female,

homemaker, 76, focus group #8). *Shinn* and *Yo* had similar memories of seeing bodies after executions, and referred to such scenes as something they would never forget. *Daisy* and *Yo* remembered their acquaintances got arrested and tortured, while their relatives also became targets of the White Terror, to such an extent that they chose to leave Taiwan (*Daisy* & *Yo*, females, homemakers, 74 & 70, focus group #8 & #3).

Many heard about the killing of elites in other cities. *Mishi*, for example, commented on why this group became a target: “They killed intellectuals, doctors, lawyers, judges, all of them were elites. Because by killing these people they could ensure that there was no more resistance” (*Mishi*, male, teacher, 80, focus group #12).

Here an urban/ rural difference seems to have appeared, in that those who witnessed the aftermath of the 228 Incident were mostly from Urban #1 and its suburban area. This urban/ rural difference makes sense, considering the fact that the arrests and massacres mainly happened in the cities, as *Yochi* recalled: “We did not see it [the killing]; they happened in the cities” (*Yochi*, male, teacher, 75, focus group #1).

The 228 Incident marked the end of people’s enthusiasm for reunion with the China, and *Yochi* noted that it was the starting point of the ethnic conflict that would then affect Taiwan for several decades. “Bensheng people’s hatred for Waisheng people started from 228 Incident” (*Yochi*, male, teacher, 75, focus group #1).

In the White Terror years the 228 Incident remained a taboo subject, one that could not be freely discussed until after the lifting of martial law in 1987. Therefore, as the testimony of the interviewees indicates, children who grew up under the KMT’s hegemony knew

nothing about what happened in this part of history, as people had been silenced and the events seemingly erased from memory.

### **Conclusion—Construction of Hegemony**

In recalling how they learned Mandarin, *Wong* and *Manny* were not the only interviewees who went to school during this era and referred to their Mandarin learning as something that “happened naturally.” While many of the interviewees from this era experienced difficulties learning Mandarin, others did not, and one thing that united all of them, as well as their parents, was that they all felt that it was a natural thing to learn the new language after the new regime was established. In a similar way that those who had been students under colonial rule accepted Japanese language and culture, those who went to school during this period also took the ruling party’s values as the norm, and moving towards them seemed more than natural and sensible than resisting them. But as was shown in this chapter, this response was actually the product of hegemony. Given the socio-political context of that era, when few people in Taiwan knew Mandarin and the KMT, having lost the rest of China, was desperate to legitimate itself as the rulers of the ROC, the purpose of the Mandarin policy was to maintain the legitimacy of the KMT, construct the dominance of Mandarin and *Waisheng Ren*, and ultimately to construct a new hegemony.

For most of the early-KMT group, during the *Kōminka* era, when Japanese was mandatory, *Taiyu* was still dominant at home, while Mandarin was not used at all. How can the learning of a language used by only a minority of people be natural for the majority? Learning a language is “natural” if a young child hears it enough to pick it up from the environment. For example, it is “natural” that Francophone people living in Ontario,

Canada, also learn English, due to the dominance of English in both the media and on the streets. However, when these interviewees were growing up very little of their world was in Mandarin, which did not enter the lives of many until they were in their teens. Thus, they did not have a natural environment to pick it up automatically, and so one was artificially created by the system the KMT set up, with people learning the new language “naturally” and without question, and so “normalization” was achieved.

The imposition of the Mandarin-only policy, and its normalization, was a key step in the KMT’s construction of hegemony. With this method, dominant values and perspectives were reproduced among the subordinates in a way that did not use what Gramsci calls “coercion,” but instead via what Bourdieu argues is “symbolic violence,” with the subordinates giving their consent to and participating in the construction of hegemony.

People’s memories demonstrated how normalization worked to construct hegemony, as they reported feeling not only strong incentives to learn Mandarin, doing so without the threat of harsh punishments, but also that everything related to this was made to seem unproblematic for people living under the system. For example, they differentiated Taiyu and Mandarin as one for home and the other for school, and never questioned why each belonged to particular spheres which could not be transcended. As a result, they saw punishments for speaking their home languages outside the home as normal, because they did something “wrong.” As *Shinn* explained, it was just common sense that, “If you did not follow the rules, it was your fault, and therefore you should be punished” (*Shinn*, male, business owner, 74, focus group #3).



The process of normalization and hegemony can also be seen in the fact that none of the interviewees ever questioned why they were learning Mandarin at school, even though many of them did criticize the Mandarin-only policy and its bad effects when they looked back on this time. This was not surprising, as what the ruling group wanted the public to know and learn was represented as neutral and natural, so that resistance to the hegemonic construction was both remade and unmade. The Japanese hegemony was built in this way, and so was the KMT's. While people may have had bitter feelings toward Waisheng Ren, who were a privileged class, it seemed that the locals never linked the use of Mandarin with Waisheng dominance or hegemony. Just as Gramsci argues, the exercise of power makes everything seem apolitical, and just part of people's lived reality (as cited in Jones, 2006). Everything that enhanced KMT dominance was thus represented as normal, including learning and speaking Mandarin, as well as the social differences between Bensheng and Waisheng Ren.

Natural as it seemed, the artificialness of this construction can still be seen in many ways, in particular in the real difficulties that newspapers, education journals, students and teachers remembered these policies. Behind the construction of hegemony there were also growing conflicts between the masses and the authorities and dominant classes, as seen in the increasing ethnic tensions during these years, and the eventual outbreak of the 228 Incident. The increasingly clear distinctions between Bensheng and Waisheng groups on the one hand demonstrated that the construction of KMT hegemony and Mandarin and Waisheng dominance were actually artificial, given the hostile environment they were in. On the other hand, the distinctions played an essential part in legitimating the concept of Chineseness and suppressing that of Taiwaneseesness, as will be seen in the next period (1949-1958), when the hegemony of Mandarin was building up.

With regard to the formation of identity, this early group, living through the aggressive establishment of hegemony, which required them to identify with Chinese people and things, reported some differences when compared with the later groups. These interviewees lived through transition of regimes, and their experiences with both the Japanese and Chinese may explain why, unlike the mid- or peak-KMT groups, they did not so readily identify themselves as Chinese.

The experiences of this early-KMT group also show the possibility of creating spaces where hegemony does not seem to operate, most often at home. As a result, their identity work took a different route from those who were more fully exposed to hegemony in later years, in that the early-KMT group generally rejected becoming Chinese, and stated that they had a closer connection to their Taiwanese identities.

## Chapter 6

### **“We took pride in speaking Mandarin”— Establishing the hegemony of Mandarin (Mid-KMT rule 1949-1958)**

We all spoke Mandarin, so there was no conflict between us and Waisheng children. (*Grace*, female, teacher, 66, focus group #7)

In the past, we made speaking Mandarin a habit and took pride in speaking it. We used it everywhere. Even at home, we would teach our family members to speak Mandarin. The situation has changed. (Bi-Guang, 1970, pp. 9-10)

*Grace* was born in 1944, and was in elementary school during most of the 1950s.

Looking back on this era many years later, Bi-Guang also recalled what happened in the peak stage of the Mandarin-only policy between 1949 and 1958. Their statements show that learning and speaking Mandarin seemed both natural and normal for those who went to school during this era, in some ways even more so than for those who went to school earlier.

This chapter examines the experiences of people who went to school or were teachers during the 1950s, from the time that the KMT left Mainland China following its defeat in the civil war, until the time before the Mandarin-only policy was loosened. This is the period that later observers, such as Bi-Guang, quoted above, saw as the height of the policy and its implementation.

The discussion here is divided into two parts— (1) the coming of Mainland Chinese after 1949 and the establishment of their dominance, and (2) people’s experience of living the Mandarin-only policy. The first part of the chapter sets up the socio-political background following the arrival of around two million Mainland Chinese in 1949. After

the 228 Incident, Taiwan was cast into the White Terror era, in which the dominance of Waisheng Ren was gradually established by magnifying the differences between the Bensheng and the Waisheng Ren. The greater distinctions between the two groups not only appeared in adult society, but were also perceived by the participants as school children. These differences, however, were seen as unproblematic, due to the effect of normalization. In addition, Mandarin was aggressively promoted as the only language for instruction to build up its dominance, which also bolstered that of the Waisheng Ren. Learning Mandarin was normal and natural in the eyes of both students and teachers, even though the practical difficulties that arose in this, as well as the punishments that needed to be meted out to enforce this policy, actually showed the artificialness of this situation. However, normalization was required in order to achieve KMT hegemony.

The concluding section of this chapter links the effects of this hegemony to the formation of identity. Toward the end of this period, the participants' attitudes toward Waishengness changed from resentment to admiration, and indication of the construction of hegemony became a lived reality. Moreover, this perception of Waishengness and Mandarin as superior inevitably had a negative impact on how people perceived their own Taiwanese-ness.

### **About the Participants**

Pseudo-nym	Gender	Birth Year	Occupation	Growing-up Place	Family Background	Highest Education	Language Used in Interview	Focus group #
Ji	M	1943	technician	Rural #1	farmers	high school	Taiyu	#3

Grace	F	1944	elementary teacher	Suburban #1	national enterprise	teachers' college	Mandarin + Taiyu	#7
Beam	M	1944	elementary teacher	Urban #1	national enterprise	teachers' college	Mandarin + Taiyu	#9
Shine	F	1945	elementary teacher	Urban #1	carpenter	teachers' college	Mandarin + Taiyu	#7
Wes	M	1945	high school teacher	Rural #4	civil servant	university	Taiyu + Mandarin	#10
Mona	F	1945	high school teacher	Rural #4	herbal doctor	university	Taiyu + Mandarin	#10
Yue	F	1945	elementary teacher	Urban #1	farmers	teachers' college	Mandarin + Taiyu	#9
Chen	M	1947	professional	Suburban #1	carpenter/farmers	university	Taiyu	#5
Sam	M	1950	professional	Rural #1	farmers	university	Mandarin + Taiyu	#4
Leaf	F	1950	homemaker	Suburban #3	lumber trade	Junior college	Taiyu	#5

Ten participants, five males and five females, went to elementary school during this era, and belonged in the mid-KMT group. These interviewees were also recruited through snow-ball sampling. Compared to the previous group, this sample contained more professionals and teachers. Six focus group interviews were conducted with these participants, who were also joined by some from other age groups.

Born between 1943 and 1950, these participants were at elementary school during the period when the Mandarin-only policy was strictly enforced. *Ji*, born in 1943, is the younger brother of *Yo* from the early-KMT group. His highest level of education was vocational high school, and he was a technician by occupation. Joining the same focus group interview as *Yo* and *Shinn*, *Ji*, like them, also used Taiyu only throughout the discussions. *Grace* was a retired elementary school teacher. Born in 1944 in Suburban #1, she used to live in a Waisheng community due to her father's job in a national enterprise. *Shine*, a year younger than *Grace* and from Urban #1, was *Grace*'s classmate in teachers' college. *Shine*'s father was a carpenter, and she joined a focus group interview with *Grace*. Like the other retired elementary teachers, *Grace* and *Shine* used more Mandarin than Taiyu in their interview. *Beam* and *Yue*, both from Urban #1, were a married couple and both were retired elementary school teachers. *Beam*'s father worked in a national enterprise, while *Yue*'s parents were farmers. Both of them used a lot of Mandarin during their focus group interview. *Wes* and *Mona*, another married couple in the same focus group interview, were retired high school teachers. *Wes* was born in 1945 in Rural #4, and his father was a civil servant. *Mona*, born in 1945, was also from Rural #4, and her father was a Chinese herbal doctor. Both *Mona* and *Wes* used mostly Taiyu in the interview, along with little Mandarin. Another married couple, *Chen* and *Leaf*, were born in 1947 and 1950 respectively. *Chen*, from Suburban #1, had a father who was a carpenter and a mother who was a farmer. *Chen* received a university education, and was a bank manager. *Leaf* was from Suburban #3, with her father being in the lumber trade. She went to junior college and was a homemaker. In their focus group interview, both *Chen* and *Leaf* only used Taiyu. The last participant in this group, *Sam*, was born in 1950 in Rural #1. Also from a farmers'

family, *Sam* went to university and was a pharmacist. He used both Mandarin and Taiyu in the interview. Note that *Leaf* and *Sam*, both born in 1950, actually went to elementary school in both this period (1949-1958) and the next (after 1959).

Besides these ten people, two participants from the Japanese group, *Mishi* and *Yochi*, were also at school as teachers during this era. Their testimonies from the teacher's perspective about the implementation of Mandarin-only policy are noted in the discussion later in this chapter.

### **Establishing Dominance of Waisheng Ren—Creation of a New Social Class**

#### **In 1949: Coming of Two Million Chinese**

The arrival of about two million Mainland Chinese meant that a significant group of people were now in Taiwan, who were very different from the existing residents. First of all, they were predominantly members of the military, along with political elites, which made them tend to see themselves as rulers and the native population as the ruled. However, in the eyes of the Bensheng Ren they were in fact refugees, fleeing from defeat on the Mainland, as *Wes* said, “They were in fact a defeated group. Taiwanese people took them in, giving them a shelter, but they treated us as if they came here to rule us” (*Wes*, male, teacher, 65, focus group #10). A similar view was expressed earlier by *Yochi* and *Wong*, from the Japanese group, who had witnessed the coming of Chinese soldiers in 1945.

Second, these refugees spoke different languages from the existing population, who predominantly spoke Taiyu, and both linguistic and cultural differences often became sources of misunderstandings and miscommunications between the two groups. While the new arrivals generally had higher levels of Chinese literacy, in the eyes of the Taiwanese

who had been under Japanese rule for half a century, both they and their culture appeared very backward. The interviewees thus noted that although Bensheng Ren had no choice but to be dominated by the Waisheng Ren, they despised the new arrivals.

Third, the newcomers were different from the Taiwanese people because, under the system created by the KMT they enjoyed political, economic and cultural superiority. Therefore, although Waisheng Ren were a minority, they were the dominant group that controlled political, economic and social resources. People who went to school during the 1950s remembered that their parents were demoted to give better jobs to the Mainland Chinese, even though the latter often knew nothing about the organizations which they were running. They also remembered their Waisheng classmates were always better dressed and favoured by the teachers. They even remembered that their Waisheng classmates and their families seemed to have a better religion.

### **Impacts of the New Arrivals on KMT Rule in Taiwan**

#### **Before and after 1949.**

With the Communist victory in the civil war in Mainland China in 1949, Taiwan, which had become part of the Republic of China after Japanese rule ended in 1945, became the only part of China that was governed by the KMT, and thus it came to represent the whole of China. Nevertheless, despite losing the vast majority of the nation to the Communists, in order to legitimate its governance, the idea of nationhood was urgently promoted by the KMT. By imposing a Chinese nationality on the population and indoctrinating them with the idea that it was their righteous responsibility to recover “the rest of the territory” occupied by the Communists, the regime portrayed itself as the true guardian of everything



Chinese. On the one hand, the KMT thus shaped the imagined nationhood of the Taiwanese people, while it also presented itself as the protector of China and its culture, which Taiwan legally represented at that time, only losing its status as the “real China” in the UN in 1971. This paved the way for the KMT to promote a national language within the territory it controlled, legitimizing the Mandarin-only policy and the imagining of a Chinese national community.

The legitimacy of the KMT regime in turn created the privileged status of Waisheng Ren. In the 1950s, the inequalities produced by this dominance further strengthened the divide between the newcomers and Taiwanese people, creating a clear “us-them” distinction. In the tense socio-political atmosphere that prevailed under martial law and the White Terror, Bensheng Ren were silenced and unable to speak out about sensitive political subjects. Their resentment toward the Waisheng Ren accumulated, even as they were also moving closer to the latter by accepting Mandarin and Chinese culture in their lives.

### **“Us” vs. “them”.**

During the 1950s, newspapers eagerly propagated an “us-them/ good-evil” distinction, which had changed from the “we Chinese vs. they Japanese” of the previous era, to “we Nationalists vs. they Communists.” When newspapers reported on news from other provinces on the Mainland, they were referred to as “the rest of the nation” stolen by the Communists, even though they were no longer under the control of the KMT government. *Central Daily News*, for example, had a report about Chinese students fleeing to Hong Kong, and said:

Chinese youth [around the world] will enthusiastically and wholeheartedly support President Chiang and his government to complete the mission of taking back our fatherland... We firmly believe that our loyal ally America will stand with us in our war against Mao Ze-dong's Communist Party, who has stolen and occupied the Mainland. ("Baozheng zhongguo qingnian, relie yonghu zongtong, quanli fangong kange [Full support of Chinese youth to fight against Communism]," 1950, p. 1)

Another example is that *Central Daily News* printed a map of ROC in a full page which included both Taiwan and the Mainland as the territories of ROC. ("Zhonghua minguo quantu [Map of ROC]," 1955, p. 5). Through the "us-them" distinction, not only was the imagining of a shared national community flagged that included both people in Taiwan and in the Mainland, but rescuing fellow countrymen, recovering the lost homeland, and speaking the national language, i.e., Mandarin, all were linked to national unification, and became part of the nationalistic project on the island.

In the nationalistic discourse, not only were the Waisheng group positioned as dominant both politically and economically at this time, because they had access to greater resources under the KMT system, but their culture, including their language, Mandarin, was also positioned as better than Taiwanese culture and language. The participants' testimony, to be discussed in more detail later, clearly shows that they were sharply aware of the ethnic and cultural distinctions, and that they often admired their classmates' Waishengness over their own Taiwanese-ness. Thus, in reaction to the differences produced in the nationalistic discourse, on the island the Taiwanese were now not only a "we" as in "we are Chinese" vs. "they are Communists," but a "we" as in "we are Bensheng" vs. "they" as in "they are

Waisheng.” Compared to the 1945-49 period, in particular before the 228 Incident, when the “rest of China” was not lost to the Communist Party and the Bensheng Ren were excited to reunite with their Chinese Tongbao, the “we-they/ Bensheng-Waisheng” distinction now became more prominent. The ethnic and cultural distinctions were further translated into economic and even class differences, and as the distinctions got sharper, greater resentment arose among the Taiwanese people, and some of this was even passed on to their children.

### **They were the heads of enterprises and the government.**

As mentioned above, the legitimization of the KMT regime allowed for dominance of Waisheng Ren. Just as in Chapter 5, where *Tamu* and *Daisy* remembered the earlier disenfranchisement of Taiwanese people, those who went to school during the 1950s remembered a similar situation. The government was controlled by the Waisheng Ren, so that people had to speak Mandarin in order to communicate with public officials. As will be shown in the next section, for *Beam* and *Grace*, their fathers, like many other Taiwanese, were forced to give up their high positions to Waisheng newcomers. Waisheng dominance created a system that was run in their interests, which in turn increased their dominance.

### **Parental Resentment of the KMT and Waisheng Ren, and Young People’s**

#### **Understanding of it in the 1950s**

Following the 228 Incident, relations between the ethnic groups were tense, and there was growing resentment from the Bensheng Ren towards the KMT and Waisheng Ren. The negative feelings of adults were often passed on to their children, as revealed in the participants’ accounts.

As mentioned earlier, the 228 Incident in 1947 launched an era of White Terror that lasted for decades. Older people who grew up under the final stages of Japanese rule lived through the incident itself, as well as the many killings that followed. The participants all remembered that people had to be careful of what they said and did during these years, as they were living under close surveillance by the government, which had many secret police and informers in local communities. As *Shine* said, “You had to be very careful about what you said before the lifting of martial law. If you didn’t, you would get into trouble, or would be arrested” (*Shine*, female, teacher, 65, focus group #7). *Beam*, who was born in 1944, talked about what his father experienced after the 228 Incident, “My dad was taken away by the KMT police in Lu-Gang [a town in central Taiwan]. He was arrested because one of his pals was problematic to the KMT. Anyone who had a connection with him was arrested” (*Beam*, male, teacher, 66, focus group #9).

After 1949, the Waisheng Ren lived separate, more privileged lives than ordinary Taiwanese, which deepened people’s resentment of KMT rule. Many of them lived in “juncun,” meaning “Waisheng military community,” with their own culture and customs, which were often the source of friction between the two groups. As will be discussed in more detail later, the privileged vs. unprivileged status of both groups was created and reinforced as a means for the KMT to construct its hegemony. The interviewees’ testimonies reveal that they were aware of their parents’ hostility against the Mainlanders, which often translated into an uncrossable line between the groups.

Due to his father’s experience, *Beam* resented the KMT more strongly than the other interviewees, and commented, “The DPP (Democratic Progressive Party) arose because the

KMT was too corrupt and too oppressive. Were people [meaning those who were forced to become KMT members] patriotic to the KMT? No way. It's a lie" (*Beam*, male, teacher, 66, focus group #9). He was talking about his youth in the 1960s when he, as a teacher, was recruited to the KMT. In *Beam's* view, the DPP was the anti-KMT party, and although it was formed during the mid-1980s, the sentiments it expressed could be traced back to the 228 Incident.

Situated in the tense socio-political environment that prevailed under martial law and White Terror, many political topics were taboo. Parents thus avoided talking about issues such as the Bensheng-Waisheng relationship with their children. But in spite of this, the stories of those who lived through this era revealed that their parents still passed on their anger against the Waisheng Ren. Although only *Beam* used the words "hated" or "disliked" to describe his own view of Waisheng Ren, many of them said that they knew their parents resented the Waisheng Ren and soldiers. These parental feelings were often reflected in the names they used to refer to the Mainlanders, as witnessed in the following exchange between *Chen* and *Leaf* (*Chen & Leaf*, married couple, bank manager & homemaker, 63 and 60, group interview #5):

*Chen*: We called them "A-shan," which was a more neutral label, meaning that they came from Shan-to, a Guangdong village [in costal Mainland]. Often people also called them "Pig" to degrade them.

*Leaf*: People did not use the name "Pig" on the Waisheng Ren until after the 228 Incident.

*Chen*: Yes, it was after the 228 Incident, a war between the Bensheng Ren and Waisheng Ren.

*Chen*'s referring to the 228 Incident as "a war" shows how hostile the relationship between the two groups was after the Incident. In another focus group, *Beam* mentioned the same tensions at school:

I remember there were more Bensheng kids than Waisheng kids in my class, and we did not get along. From time to time we fought. I had a strong dislike for them, and I called them "Pig bucket." I had heard my parents make very negative comments about them.  
(*Beam*, male, teacher, 66, focus group #9)

*Beam*'s account was echoed by *Wes*, who also adopted derogatory names for the Waisheng Ren, which he learned from his parents. "We called them 'Waisheng-ah' [a belittling Taiyu phonetic ending], or worse, 'Waisheng pig'," said *Wes* (*Wes*, male, teacher, 65, focus group #10).

Terms such as "Pig," "Waisheng pig," or "Pig bucket" expressed the deep-seated bitter feelings of many Taiwanese against the Waisheng Ren. However, before the 228 Incident, the ill-feelings toward the Waisheng mainly stemmed from their perceived backward and lack of discipline, but after the massacres resentments deepened and solidified.

In the same interview with *Wes*, *Mona* also recalled her father's dislike for the Waisheng Ren:

I knew my father strongly disliked the Waisheng Ren. They were better off because the government supported their lives, especially the Waisheng soldiers. My father had

unpleasant experiences in dealing with them, and he said he did not want Waisheng Ren in his clinic, as they were brutal and impossible to deal with. (*Mona*, female, teacher, 65, focus group #10)

In echoing *Mona*'s account, *Wes* added that parents in the countryside "always cautioned their children, especially young girls, to beware of the Waisheng soldiers, who were very poorly disciplined" (*Wes*, male, teacher, 65, focus group #10).

Not only was the ethnic distinction noted, but *Leaf* and *Shine* revealed that the boundary between the two groups was not transcendable. According to *Leaf*, "Bensheng parents wouldn't marry their daughters or sons to Waisheng Ren. At that time, girls from decent families would not marry Waisheng Ren" (*Leaf*, female, homemaker, 60, focus group #5). *Shine* also recalled, "My mother used to say that she would rather her daughters die than marry them to Waisheng Ren" (*Shine*, female, teacher, 65, focus group #7).

Despite the strong differences and high tensions between the two groups, the Bensheng Ren still remembered the 228 Incident, as well as the dangers of the White Terror, and thus could not openly express their bitterness. As *Grace* remembered, her father, like other Taiwanese employees, was demoted at work, and had to learn Mandarin in order to communicate with his supervisors, "Suddenly he became supervised by Waisheng Ren. He was also demoted like all the other local employees. What could he do? He just learned to speak his broken Mandarin in order to communicate with his supervisors" (*Grace*, female, teacher, 66, focus group #7).

## **Young People's Awareness of Bensheng/Waisheng Differences**

Young people may not have been fully aware of what was actually behind their parents' bitter feelings towards the KMT and Waisheng Ren, as such things were usually not discussed. However, they definitely noticed that their Waisheng classmates were different from themselves, since the differences were too great to be overlooked.

### **Bensheng poverty vs. Waisheng wealth.**

*Grace*, for example, revealed the following sharp distinction in her personal experience:

In the first elementary school I studied, which was located in a Waisheng community, most children had shoes to wear. But in the second school I transferred to, which was located in the suburbs with most of the students being Bensheng children, more than half of them went to school bare-footed. (*Grace*, female, teacher, 66, focus group #7)

According to *Grace*, it was essentially the same situation when she became a teacher and taught in a suburban school with mainly Taiwanese children in 1964, where many students still went to school without wearing shoes.

The way *Leaf*, *Chen* and *Ji* remembered their family situations was that things were different for their Waisheng classmates. For example, *Chen*, who grew up in the suburbs, remembered that he wore shorts made of flour sacks, with "U.S.-AID" printed on the back." *Chen* added, "We went to school mostly bare-footed. A few were luckier to have shoes to wear, but their shoes had patches everywhere" (*Chen*, male, bank manager, 63, focus group #5).

*Shinn*, in the previous group, who was born in 1936 and was in his teens in the 1950s, made some comments during *Chen's* interview. He also remembered wearing flour sack



shorts, but he was more fortunate than others in that he had shoes, too, “I was lucky to have a pair of shoes, but they were only for important occasions, and they had to be passed on to my younger brothers” (*Shinn*, male, business owner, 74, focus group #3). *Chen* remembered having no schoolbag and “had to make do by wrapping my books in a cloth” (*Chen*, male, bank manager, 63, focus group #5). Meanwhile, *Leaf*, who was from another suburban area, remembered, “I had schoolbags and shoes, but I also remember that our socks were torn with holes” (*Leaf*, female, homemaker, 60, focus group #5).

In contrast, students from this era remembered their Waisheng classmates as very different from themselves. When asked how they knew such children were not Taiwanese, *Shine* noted, “They looked different. They looked neater, dressed better, and their families were better off than ours. They spoke only Mandarin” (*Shine*, female, teacher, 65, focus group #7). *Grace* concluded by saying, “Now when I look back, I understand why there were the contrasts. Of course their families were better off, because they had better access to resources” (*Grace*, female, teacher, 66, focus group #7). Such a realization, however, did not come to her as a child but only after martial law was lifted, and the formerly excluded narratives became widely known and discussed.

### **Waisheng social superiority.**

Coming from better-off families, the Waisheng students, as participants’ observed, were always dressed more neatly and were more outspoken and outgoing. According to *Chen*, “They were outgoing because they lived better lives. When they did not have to worry about life, they were more sociable and gregarious” (*Chen*, male, bank manager, 63, focus group #5). *Grace* made a similar comment, and in it a sense of resentment was felt, “My father

worked at a sugar-manufacturing factory. His superiors' daughters were all in my class. They did not get better grades than I, but they were always better and more beautifully dressed" (*Grace*, female, teacher, 66, focus group #7).

In the interviewees' memories, their Waisheng classmates' not only had a better economic situation and more confident and care-free personalities, but their better Mandarin also led to feelings of superiority and inferiority. As *Grace* and *Shine* remembered, Waisheng students were often assigned to represent the class, or even the school, in Mandarin speech and composition contests. Being better dressed, more outgoing, more sociable and speaking better Mandarin often made Waisheng children the favoured students in a class. *Shine* recalled how her teacher treated the Waisheng students differently:

I did feel my teacher favoured several Waisheng students whose fathers were university professors. I remember one of my classmates was named "Nianping," meaning "missing Beiping (Beijing)—born in Taiwan, but missing Beijing." I could sense that the teachers apparently liked them more than us. (*Shine*, female, teacher, 65, focus group #7)

### **Waisheng as better educated.**

While most participants talked about the differences between themselves and their Waisheng classmates, and how they managed to get ahead academically against unfavorable economic and social odds, *Sam* specifically referred to his feeling that Waisheng Ren were fundamentally superior to Bensheng Ren at the time:

On average, parents of the Waisheng kids, even the Chinese soldiers, had better education than Taiwanese parents, let alone those officials. With higher cultural

upbringing, their children were superior to Taiwanese children on average...Take university enrolment as an example.

*Sam* continued:

Thirty percent of the student population of the first-class universities were Waisheng students, and seventy percent were Bensheng students. But the Waisheng Ren only accounted for 15% of Taiwan's population, while Bensheng Ren, 85%. You can easily see that they had a much higher cultural level than Bensheng Ren. But of course now I know they were superior because they had more access to social and educational resources. Back then, I did not know that, but saw their superiority as fundamental.

(*Sam*, male, pharmacist, 60, focus group #4)

#### **Waisheng religion seen as superior.**

In *Sam*'s memory, another factor that contributed to the feeling that Waisheng Ren were superior was their religion. As he stated, "When you compared Taiwanese religious worship, the temple festivals that local Taiwanese people attended, with the Christian church services Waisheng people went to, you would know the differences between being classy and being backward" (*Sam*, male, pharmacist, 60, focus group #4).

However, despite these perceptions, the reality was somewhat different. After 50 years of Japanese rule, enrolment in compulsory education had reached 71.3% for Taiwanese children by 1944 (Taiwan Provincial Administrative Executive Office, 1946; P. Xu, 2005), and thus the Taiwanese were actually better educated, on the average, than the Mainlanders. *Sam*'s perception that the reverse was true reveals how power shaped people's view of the world. In particular, the power of hegemony to normalize things and make them

unproblematic can easily be seen when *Sam* also commented that he had no idea what was really going on with the large number of Waisheng students' in top universities. Another thing worth noting in his account is the image of Waisheng Ren and the meaning of Waishengness in the eyes of Taiwanese children, with both being seen as clearly superior to Bensheng Ren and Taiwaneseeness.

### **The Relationship Between Bensheng and Waisheng at School**

#### **Between male students.**

As discussed above, both male and female participants noticed that Waisheng students were different. Male students had different experiences from female ones about getting along with second generation Mainlanders at school. *Wes* left his neighbourhood and went to a junior high school in 1957 that was close to a Waisheng community, and in which Waisheng students outnumbered Bensheng ones:

I remember the two groups fought a lot during the breaks. Nothing serious resulted in the fights. Somehow, we just did not get along. They were not serious fights either, but rather they playfully acted as outlets for our bitter emotions. We did it during every break. (*Wes*, male, teacher, 65, focus group #10)

For *Wes*, the two groups seemed to represent two clear ethnic categories and there was an uncrossable nationalized line between them, "At that time, I felt I was Taiwanese. Although we did not use the word 'Taiwanese,' we used 'Bensheng Ren' and 'Waisheng Ren,' which for us meant 'Taiwanese' and 'Chinese' now when I think back" (*Wes*, male, teacher, 65, focus group #10). *Wes* pointed out that the roots of the conflicts were as much economic as cultural:

When I think back now, we spoke different languages, which might be why we did not get along. Besides, Bensheng children were from poorer families and parents strived to let them have an education. In contrast, Waisheng children had subsidies for their education. They were privileged, compared to us. (*Wes*, male, teacher, 65, focus group #10)

The resentment that the Bensheng students felt for the Waisheng was evident in his memory, “When we saw Waisheng students, we called them names in a low voice.”

*Beam* felt that the patterns seen in the wider society were reproduced in school, and also remembered many conflicts, “People hated Waisheng Ren because they treated us discriminatorily. It was the same situation at school, where Waisheng kids bullied Bensheng kids brutally” (*Beam*, male, teacher, 66, focus group #9)

As shown above, the negative comments of the parents affected how the participants viewed their Waisheng classmates, but the exact nature of relationships between Waisheng and Bensheng children appeared to have depended on the context. As *Chen* remembered, “There was only one Waisheng student in my class. He got along well with us” (*Chen*, male, bank manager, 63, focus group #5).

### **Between female students.**

The female participants seemed to have had a different experience with regard to getting along with their Waisheng classmates. For example, physical confrontations did not occur among the girls, although as *Leaf* noted,

The Waisheng students in my class formed a small circle, and we were not part of it. They were different from us. They were more outgoing. They talked to boys, played ball games, and went to movies with them, which we conservative Bensheng girls wouldn't do. (*Leaf*, female, homemaker, 60, focus group #5)

Women who went to school during the 1950s generally said that they did not remember conflicts with Mainlander children at school. However, as *Shine*, *Grace*, and *Leaf*, who were quoted earlier in this chapter, remembered, they did know if someone was a Waisheng child, because they were quite different from Taiwanese children in many ways, including in the language they spoke. As *Shine* remembered, "There were both Bensheng and Waisheng children, mostly Bensheng students in my class. Those Waisheng students spoke Mandarin, while we [Taiwanese students] spoke Taiyu" (*Shine*, female, teacher, 65, focus group #7). *Grace* echoed her, "We could not communicate in the beginning because they spoke Mandarin. We all knew that they were Waisheng Ren" (*Grace*, female, teacher, 66, focus group #7).

The obvious differences that they were conscious of, however, did not seem to arouse any serious conflicts between the women interviewees and their Waisheng classmates.

Note that in the focus groups in this Mid-KMT cohort gender differences were not as marked as in the previous cohort. For one, the number of men and women participants was about the same. For another, in focus groups where the participants were married couples, the wives generally talked as much and responded as freely as their husbands, with *Yue* as perhaps the only exception to this. *Yue* did not talk much, and when she did, she always did it after her husband, *Beam*, responded first. In two ways these focus groups help us

understand the gender patterns displayed in men's and women's experiences getting along with Waisheng students. First, while men chose to express their dislike for their Waisheng classmates via physical or verbal violence, women instead were more strongly aware of their differences from Waisheng students, which were perceived in terms of superior/ inferior, and led to their feelings of admiration or envy. Second, considering the fact that both *Beam's* and *Wes'* conflicts with their Waisheng classmates happened in urban areas, there seemed to be an urban/ rural difference at play, which however can be explained by the fact that Waisheng Ren mainly resided in Waisheng communities in urban areas.

### **Living the Mandarin-only Policy—From 1949 to 1958**

The Mandarin-only policy, which played an essential role in the interviewees' school years, was a key part of the process in which KMT and Waisheng dominance was constructed. During this period there was a complete ban on the use of home languages at school. As will be discussed in this section, with the successful promotion of the policy, those who went to school during this era took the dominance of Waishengness and Chineseness as unproblematic and natural, which shaped their understanding of their own languages and Taiwaneseess. In what follows, the role of the Mandarin-only policy in the establishment of hegemony will be discussed from several aspects, including the policy itself, the Mandarin promotion committees at both the national and local levels, the representation of the Mandarin campaign in public spheres, i.e. newspapers and journals, as well as the interviewees' lived experience of the policy.

## **Promoting Mandarin-only Policy**

### **The state policy itself.**

After the 228 Incident in 1947, the KMT sought to control the Taiwanese people by stronger surveillance and more strictly enforced monolingual policy, and these measures were in part taken to quell people's growing opposition to corruption and bureaucracy. After Wei Jian-gong, the first head of the Mandarin Promotion Council who advocated promoting Mandarin via dialects, was dismissed in 1947, the language-in-education policy became monolingual, and dialects were no longer accommodated in the classroom. While the Mainland Chinese administration may have felt insecure with the majority of people speaking a language that they could not understand, the policy was implemented in the name of "strengthening national solidarity," as newspapers published during that era often claimed. Dialects were thus banned because the use of them divided the nation.

Dialects were completely banned in class from 1949 onward, and many other related measures were also implemented to make this period of about 10 years the most successful years of the monolingual policy. A system of Mandarin phonetic symbols (MPS), the so-called "Zhuyin Fuhao," was taught prior to teaching Chinese characters, and this approach remains the predominant phonetic system in teaching writing and reading in elementary school in Taiwan, while in the PRC it has long been replaced by the Pinyin system (R. Zhang, n.d.).

As the lack of qualified teachers continued to be a problem during this stage, thus in-service training and teacher education were priorities. From 1949 onwards, student teachers had to successfully pass a Mandarin language exam before they could graduate (He,



1950; B. Zhang, 1972). From 1950 onwards, intensive training courses of various lengths, from two weeks to a year, were offered to teachers islandwide, in particular for those working in Taipei city, due to the greater budget allocated to this area (He, 1950). These courses were mandatory, and teachers' performances on them were linked to their year-end reviews for promotion.

In 1949, radio programs teaching Mandarin were launched to reach people living in remote places. The Mandarin promotion policy even extended to aboriginal people, starting in 1951, following the establishment of the Mandarin Promotion Committee in aboriginal villages (B. Zhang, 1972).

In short, various measures, as well as their strict enforcement and active implementation, meant that the process of language reform reached a peak during this era, which ran from roughly 1949 to 1958. The relationship between Mandarin and the dialects spoken in Taiwan changed as the government no longer saw them as a stepping stone to learning Mandarin. In accord with state policy, the media started representing dialects unfavorably. As such, Mandarin was shown as superior to the other languages used in Taiwan, given its status as the "national language." Moreover, as noted above, it should not be forgotten that the aim of this policy was to encourage national solidarity and support for the KMT.

### **The Mandarin Promotion Council.**

Following the Retrocession, the promotion of a single, national language was considered one of the main priorities of the new administration. For this reason, the KMT applied its experience of promoting Mandarin in "the rest of the nation" to Taiwan, and established the provincial Mandarin Promotion Council to be in charge of the state's

language planning in April 1946 (G. Yang, 1982). Although this was based on the KMT's mainland experience, the strict enforcement of the policy in Taiwan, in order to achieve consistency between the spoken and written forms, was never seen to the same extent in the other provinces. Chen-Yi's determination "to complete the transition to Mandarin in Taiwan within four years" (X. Xu, 1991) shows the ambition at work here. The provincial Council was an independent organization in charge of both the planning and enforcement of the policy, which included abolishing Japanese language use, establishing a standardized spoken form, prescribing a phonetic system and setting up promotion councils at the local level, including councils in aboriginal villages in 1951. The most intense period for the implementation of the monolingual policy was between 1949 and 1958. In 1959, the independent provincial council was integrated into the provincial government (M. Chen, 1998; Y. Hong, 1975). From 1949 onward, government policy tightened to ban the use of dialects in classrooms. The discourse of dialect revitalization that had served its purpose of de-Japanization and Mandarin promotion in the early-KMT era was thus replaced with a view that saw dialects as barriers to Mandarin promotion and threats to national solidarity.

This nationalist perspective persisted throughout the Mandarin-only era, and will be further examined in the discussion of the following era. Note that the same home language, Taiyu, was accommodated in the previous stage because it was thought that this would make it easier for the Taiwanese to learn Mandarin, while it was prohibited in this stage because it was felt that its use encouraged localism, and hence damaged national solidarity. The key point here is that how Taiyu was viewed changed quickly and dramatically, and this perspective was imposed on the population, and often in ways that made the dominated group internalize it, without seeing anything problematic.

## Teachers' Views of the Policy and Their Teachings

### For the students' good.

The Mandarin-only policy is commonly regarded as one of the most successful examples of implementing a monolingual policy in a multilingual society. Just as Peterson (1997) argues that the problems faced by the Mandarin campaign in Guangdong China in 1949 to 1995 lay in the resistant attitudes of school teachers who stood between the state and the peasant populace, it also makes sense to assume that the relationship between the schoolteachers and the state played a role in the success of the policy in Taiwan, where schoolteachers felt confident that they were doing the right thing and helping their students. When looking back, *Mishi* and *Yochi*, two interviewees who taught in elementary schools during the 1950s, did not doubt the righteousness of their enforcement of the monolingual policy, believing that their compliance with the policy was for their students' benefit. *Yochi*, for example, thought that as a teacher he should carry out what the state wanted him to do, "We were just executives of the policy. We did what we were requested to do. It never occurred to me to question the policy" (*Yochi*, male, teacher, 75, focus group #1). *Yochi* also talked about his attitude toward punishing students for speaking home language at school, which he justified by saying that:

It was for the students' good. My attitude back then was a different attitude from today. I didn't think much. I was just doing my job as an executor of the policy. I thought I was doing my students good. (*Yochi*, male, teacher, 75, focus group #1)

The same perspective was echoed by *Mishi* in a different interview. “Back at the time, we were just doing our part as a teacher. We promoted Mandarin as we thought we were doing the students’ good.” (*Mishi*, male, teacher, 80, focus group #12).

Such a view was of course reasonable due to the effects of hegemony, which worked by blurring problematic issues to win the consent of the dominated group. As will be discussed in Chapter 8 in more detail, there is a relationship between teaching as an occupation and teachers’ comprehensive exposure to hegemonic state values. As a result, these two teachers, *Yochi* and *Mishi*, never questioned or challenged the monolingual policy, although they did state that they strongly disliked the newcomers and resented how they themselves were treated by the authorities. Still, Mandarin was the language of education, which gave them a good reason to learn it and then later teach it to their students.

### **Parental Attitudes Toward Schools, Teachers, and Mandarin**

By the 1950s, parents, who had witnessed the coming of Chinese soldiers and experienced the discriminatory treatment they gave out to the Taiwanese, no longer had high expectations of either the KMT administration or the fatherland itself, but instead felt despair and frustration. The 228 Incident and the White Terror era that followed it put the mass of the population in opposition to the KMT, as the interviewees’ perceptions of their parents’ resentment reveal. However, the bitter emotions of adults toward the government, both at this time and the others examined in this study, did not mean that they opposed learning Mandarin, mainly because they saw it as a tool to empower their children, as generally shown in the accounts of this mid-KMT group.

In addition to the reasons outlined above, two other things led people to accept the Mandarin policy. The first is that in Chinese culture a good education has long been seen as a way to achieve fame and social status, as seen in a common expression “Shi, Nong, Gong, Shan [scholars, farmers, labourers, merchants]” that placed scholars at the highest level of society. As Mandarin was the language of education, learning Mandarin was naturally seen as the key to a brighter future. Second, and closely related to the first point, teachers and scholars were highly respected vocations, and thus parents trusted what they did in schools. All of the interviewees mentioned this trust when they talked about their parents’ attitudes toward schooling. For example, *Shine*’s parents took “what the school taught” as “right.” “They wanted us to learn whatever the school taught us, including Mandarin. They wouldn’t say that we should not speak Mandarin,” said *Shine* (*Shine*, female, teacher, 65, focus group #7). For *Grace*, “What teachers said was taken like ‘Shengzhi [imperial edict],’ which was obeyed with all respect by students and parents” (*Grace*, female, teacher, 66, focus group #7).

These parental attitudes transferred to the students, as *Ji* commented, “Whatever our teachers told us to learn, we learned it. We had no second thoughts” (*Ji*, male, technician, 67, focus group #3). Similar views were expressed by *Leaf*:

Back at that time, children were simpler, so were parents. Parents wouldn’t put in a word if their children got spanked at school. They simply took it as their children’s fault. They even asked teachers to spank their children if they misbehaved or if they did not learn diligently. Their perspective was very different from parents’ today. (*Leaf*, female, homemaker, 60, focus group #5)

*Yue*'s parents expressed a similar view, exhorting her to "listen to the teacher and learn everything taught at school well" (*Yue*, female, teacher, 65, focus group #9). Another important factor that accounted for parents' compliant attitudes lies in the reality that there were no Taiyu elementary schools, and thus the choice was either Mandarin or no school.

Last but not least, parents clearly understood that under a system where Mandarin was the official language, failing to learn it would cause many practical difficulties in everyday life. For example, as the monolingual policy was enforced throughout all government institutions, and not only schools, often the only way that people could communicate with officials or civil servants was through their Mandarin-speaking children. The plight faced by *Leaf*'s parents because of their illiteracy was also a common one, and underlay many parents' attitudes toward learning Mandarin:

Whatever the teachers taught us, we learned, because parents thought schooling was our only hope for a better future. They wanted us to receive at least elementary school education to be literate. When they wanted to write a letter, they had to ask villagers who were literate to help. They deeply felt the pain of being illiterate. So they wanted us to have an education. (*Leaf*, female, homemaker, 60, focus group #5)

### **Children's Understandings—The Worst Thing was Speaking Taiyu at School**

Children who spoke Taiyu at school thus gained no sympathy or support from their parents. As *Grace* remembered, "If I was punished at school for speaking Taiyu, I would be punished again by my father when I got home" (*Grace*, female, teacher, 66, focus group #7). This statement was echoed by other participants, including *Yue*, *Leaf*, and *Shine*, who said that their parents were fully supportive of the school and teachers, and would punish

them for things “they did wrong.” Parents’ attitudes here not only revealed their full trust in teachers and schooling, but more importantly, it reflected their belief in the value of learning Mandarin. Speaking Mandarin thus became one of the hegemonic values that parents wanted their children to adopt, something that the latter quickly understood. As *Grace* said, “Therefore, the last thing I would do at school was speak Taiyu” (*Grace*, female, teacher, 66, focus group #7).

### **Learning Mandarin at School**

Given the interviewees’ and their parents’ attitudes, the adoption of Mandarin seemed “natural,” and thus met with no resistance. Nevertheless, the fact that it was not natural can be seen in the practical difficulties that children encountered, and the punishments that they often received in relation to learning this language.

#### **Practical difficulties.**

When asked about when and how they learned Mandarin, nearly all the participants said that they started learning it right after they started school. *Grace* was the only exception, in that she started picking up Mandarin at an even earlier age, as she grew up in a Waisheng community due to her father’s job in a factory, where many higher-ranked employees were Mainlanders. But regardless of when they started learning Mandarin, all of them recalled that they learned it naturally, without major difficulties. Compared to those who went to school in the mid- and late-1940s, who had teachers that did not know Mandarin at all before teaching them, the difficulties mentioned in the accounts of this cohort were comparatively minor.

Only two people who went to school in this era reported difficulties learning Mandarin. *Mona* and *Leaf* complained that their teachers' bad pronunciation led to their poor pronunciation today. However, they did not actually mention this as a major difficulty. For example, *Mona* jokingly talked about her Mandarin teachers' Taiyu accent:

I grew up in the countryside. Our teachers had received Japanese education and couldn't speak good Mandarin. They spoke "Taiwanese Mandarin" and so we learned "Taiwanese Mandarin" from them. My Mandarin made me become the subject of jokes when I went to university in northern Taiwan. (*Mona*, female, teacher, 65, focus group #10)

*Leaf* also referred to her teachers' Taiwanese accents as the biggest problem she encountered, "I started learning Mandarin from grade one; however, my teacher couldn't pronounce standard Mandarin, and that is why people of our age could not speak good Mandarin" (*Leaf*, female, homemaker, 60, focus group #5).

Here, as with the gender difference reflected in the early-KMT cohort, the statements made by *Mona* and *Leaf* show that gender issues affected their identity formation. Their distinguishing two levels of Mandarin, as *Daisy*, *Yo*, and *Yinno* did in the previous cohort, reveals their stronger desire than men to speak standard Mandarin, and hence the gender differences.

### **Punishment.**

According to the interviewees, in the 1950s they faced various forms of punishment which were more severe than those the previous groups had faced. When asked to talk about the punishments for speaking Taiyu at school, all but two of the mid-KMT group, who



studied in rural schools and did not remember their teachers ever punishing people for this reason, clearly recalled themselves or their classmates being disciplined for this. However, they also noted that they were not punished many times, as they did their best to avoid breaking this rule again. As *Beam* recalled:

My teacher was very strict. I was rebellious at first and was severely punished for that. But later I figured out that in order not to be punished, I'd better keep my mouth shut before I could speak Mandarin. No one dared being resistant. My teacher was harsh and would spank us hard. (*Beam*, male, teacher, 66, focus group #9)

Similarly, *Grace* stated:

Being punished once, then we knew that to avoid being punished again, we had to speak Mandarin all the time... I remember those who were punished by having a dunce board hanging on their back, saying "I spoke dialect." Just punished once, children did their best to avoid such humiliation, and we knew we should speak Mandarin. (*Grace*, female, teacher, 66, focus group #7)

While most interviewees were convinced of the inappropriateness of speaking their home languages at school, and did what they could to avoid the punishment, *Ji*, the oldest of this group, claimed that he and his classmates were not happy about being disciplined in this way, as they could not understand what they had done wrong. However, they did not ask questions, for fear of being punished:

In fact we felt upset about being punished for violating the regulation of not speaking Taiyu any time at school. How come we should be punished for speaking our home

language? We were unhappy but nobody dared say anything. Children had no power to resist. We could only do what we were told to. Now when we look back, it was such a bad policy. (*Ji*, male, technician, 67, focus group #3)

*Ji* seemed to be different from the other interviewees in his rebellious attitude toward the punishment for speaking Taiyu at school. Note that he is the oldest of this age group, and had siblings who had received Japanese education and witnessed the Retrocession, and thus may have heard things from them that affected his attitude. However, in comparison to all the other interviewees, who did not raise any questions about the prohibition of their home language at school, *Ji*'s resistance actually reveals the artificialness of the policy.

*Ji*'s statement shows how power shaped the students' reactions. Most people under the system did not question it openly, although some may have done so in their minds. It is also possible that young people's lack of experience made them see extraordinary things as normal, and thus they did not think about questioning it. But as will be discussed in the following section, it is also likely that hegemony worked to normalize Mandarin learning, so that not only young students but also their teachers internalized the dominant values and saw the extraordinary as ordinary. Under conditions of hegemony, complying with rules appears to happen "naturally."

Here a rural/ urban difference seemed to have emerged in how participants remembered being punished. That is, severe punishments mainly happened in urban schools. Two things may explain this pattern. For one, as parents and teachers of urban or suburban schools tended to be more concerned about children's academic performances, and they knew that Mandarin meant education, much effort was made to ensure that children abided

by the policy. It thus made sense that severe punishments were adopted for this purpose. For the other, the quality of teachers was often lower in rural schools than in urban ones, due to funding issues. The Mandarin-only policy was thus not strictly enforced via punishments because rural schools were far from the power center, or because teachers themselves could not speak good Mandarin. Such an urban/ rural pattern thus is of significance in two senses. First, it means that children from urban schools may have been more convinced of the language's close connection with the hegemonic values, and thus have more readily accepted the use of punishment. Second, it reveals that children from rural areas, in schools with poorer teaching, especially of Mandarin, had to make more efforts to get ahead in life. That said, they still believed as much as urban children did that learning Mandarin was worthwhile, and the fact that these respondents did enter the middle-class testified to their efforts and their acceptance of hegemonic values.

### **The View of Mandarin-learning as Natural and Normal**

The reality of how young people learned Mandarin during this era reflects how unnatural it was. For one thing, the participants grew up in Taiyu speaking families, and before entering school this was their only spoken language, and yet once in class they were made to speak only Mandarin, with “ease of communication to promote national solidarity” as the only reason given to them for this, according to *Grace, Yue, Beam*, and several others in this group. The promotion of Mandarin was normalized, and thus none of the participants ever questioned why the language of the minority ethnic group has to be adopted by the majority. Nor did the participants question why it was that, as *Grace* said, “We [Bensheng and Waisheng children] all spoke Mandarin” but not “We all spoke Taiyu, so there was no conflicts between us and Waisheng children,” (*Grace*, female, teacher, 66, focus

group #7) or that, as *Manny*, who belonged to the previous group, said, “We all spoke Mandarin, so the Mainlander children did not have chance to learn to speak Taiyu” (*Manny*, female, teacher, 70, focus group #12).

In addition, apart from *Grace*, none of the interviewees grew up in an environment where Mandarin could be naturally picked up, but they still regarded learning it as natural. *Grace* recalled she was able to use Mandarin before she entered school, because she lived in a Waisheng community due to her father’s job. In order to communicate with his supervisors, her father learned Mandarin, even though he spoke it with a heavy Taiyu accent. Mandarin acquisition was thus not “natural” at all for *Grace*’s father, while for *Grace*, it was. She recalled, “My neighbours were all Waisheng Ren. My teachers were Waisheng Ren too, who spoke Mandarin with heavy accents” (*Grace*, female, teacher, 66, focus group #7).

However, unlike *Grace*, the other participants did not have an environment to naturally pick up Mandarin, and thus experienced a sudden change when entering the classroom, with its Mandarin-only policy. Still, instead of feeling that this was awkward, they regarded the acquisition as “natural.”

Also, as discussed earlier, many people held strong resentments toward the Mainland Chinese and the ruling KMT. Note that this was the era following the 228 Incident, when the population was subject to the White Terror. However, the negative feelings this led to did not make people turn against learning Mandarin. How could this happen when people hated the system that brought in the new language? How did speaking Mandarin become natural, and even a source of pride, for those who did not naturally acquire it in their daily lives? The answers to both questions are based on the normalization of the monolingual

policy. In addition, as discussed in the literature review, a key point in establishing hegemony is to exploit “the desire for empowerment” that exists among the dominated people. Mandarin was the language of power, and so people had strong incentives to adopt it, while the mechanisms underlying this dominance remained invisible. As *Chen* said,

Children are naive. It never occurred to us to question why we had to speak a different language other than Taiyu at school. The only thought we had for school was that what we learned at school was for education and for a better future. (*Chen*, male, bank manager, 63, focus group #5)

The experience of punishment also reflected how people accepted the normalization of Mandarin, as both the children and their parents felt there were valid reasons for being disciplined if they spoke another language at school. In interviewees’ recollections, they did not feel humiliated or upset by the punishments, but instead tried to avoid them by learning Mandarin. This process also taught them that Mandarin was more prestigious than their home language, and so it was appropriate to use for education and in public places. As discussed earlier, while their being young and inexperienced helped to make this seem normal, the construction of KMT hegemony and Mandarin/ Waisheng dominance also led them to not even notice this form of oppression.

Note that, as discussed earlier, the Mandarin learning environment had improved by this time, so that learning it was easier. Nevertheless, the interviewees recalled that their teachers still used various forms of strict punishments to ensure that they would do their best to learn the language, as well as support the KMT’s overall nationalist goal. First, punishments were used to keep rebellious people from challenging the system, as in *Ji*’s case

above. Second, in an age when the KMT was desperate to establish its legitimacy, Mandarin was used to increase national solidarity, and thus it needed to be used in public spaces, with punishments for those who did not. Finally, these punishments were meant to make participants clearly understand the “inappropriateness” of using their home languages, and thus contributed to their sense of inferiority about both Taiyu and Taiwanese-ness.

On the teacher’s part, the use of punishments might indicate that they supported the language policy, and thus the KMT’s values and interests. It should also be noted that this was the White Terror era, and teachers who dared to undermine the system would have been in serious trouble. However, their comments in the focus groups show that teachers at this time were deeply convinced of the value of Mandarin, as well as their teaching of it, as was discussed earlier. As also mentioned above, another thing that contributed to the normalization of Mandarin was that the only way that most ordinary people could communicate with officials or civil servants was through their children who could speak Mandarin.

### **Conclusion—Construction of Hegemony**

As shown in this chapter, “normalization” was the key mechanism that aided the implementation of the Mandarin-only policy, as well as the wider establishment of the KMT’s hegemony. Learning Mandarin was thus normalized, as was not speaking Taiyu in school. That Waisheng children could not speak Taiyu was normal, but that Bensheng children could not speak Mandarin was not, and consequently they had to learn the new language.

Moreover, in addition to the issue of language, the differences between the Bensheng and Waisheng Ren were also normalized. This objective was not only done through political surveillance, but also by creating the perception of cultural and linguistic superiority, thus moving the KMT's hegemony from one of military dominance to a system of cultural, economic and social dominance, and developing the original ethnic/ linguistic Bensheng/ Waisheng distinction into a class issue in the next era.

### **Of Course it was in Mandarin**

As discussed earlier, the promotion of Mandarin was in essence part of a nationalizing discourse. Mandarin was represented as the symbol of the nation, and thus its use was closely linked to national reunification and solidarity, and learning and speaking it were linked to patriotism and a good citizenship.

However, this normalization was not only about nationalism. It also involved the creation of a sharp contrast between Mandarin and the various home languages, with the former being superior, linked with "being refined, civilized, and cultural," and the latter being inferior, and linked with "backwardness, coarseness, and antiqueness." The mass arrival of the Mainland Chinese in 1949 also created a new social class whose privileged status was produced by the KMT system. Although this system was resented by the Taiwanese, its values and language became the norm during the 1950s, and many Bensheng Ren sought ways to advance their own interests by working with the system, and so they gradually internalized its values. There were thus many "natural" incentives to learn the language of power, while keeping dialects for home use.

### **Changing by the End of This Period—From Resentment to Admiration**

As shown in the above, although the Taiwanese people were silenced by the harsh socio-political atmosphere after the 228 Incident, which lasted throughout the White Terror period, they still managed to pass on their resentments and bitter feelings to their children, and thus influenced how the interviewees in this work saw their Waisheng classmates. However, with the complete establishment of the KMT's hegemony, as will be shown in the following discussion, how the children reacted to their parent's feelings changed. Specifically, while the earlier groups mostly understood and shared their parents' resentment, this gradually became a mixture of resentment and admiration, and ultimately mostly admiration.

This change is revealed in the fact that among all the interviewees who went to school during this era, *Beam* and *Wes* were the only ones who expressed a strong dislike for their Waisheng classmates. The others did not seem to be strongly affected by their parents' bitter feelings, and instead they only perceived some of the Bensheng and Waisheng differences, which were seen in terms of inferiority and superiority, respectively. This explains why, in *Sam's* eyes, Waisheng Ren were superior not only culturally, but also religiously. Things related to Waisheng Ren gradually became the standards that young people wanted to pursue, and thus they moved away from their own sense of Taiwaneseess and the use of home languages. This is also truer for the younger interviewees, who went to school during this period, than for the older ones.

Here the class orientation of this mid-KMT group played a key role in explaining this change with age. Most of this group came from working class backgrounds, but eventually



entered the middle-class, and so they were more likely to have stronger awareness of, as well as admiration for, the “superiority” of their Waisheng classmates. In their striving to get ahead in life, they were thus more deeply exposed to the effect of hegemony, which became their lived reality.

This sense of inferiority and its effects on the participants’ identities will be discussed later in Chapter 8, which focuses on their becoming Taiwanese. But in brief, a non-hostile or even admiring attitude toward Waisheng Ren and Mandarin made it easier for people to adopt a Chinese identity. In their school experiences, the sense of “being inferior” as Bensheng Ren and Taiyu speakers played an essential role while they contested the meanings of Taiwanese and Chinese identities under the hegemonic KMT system.

## Chapter 7

### **“We wanted to speak not just Mandarin, but good Mandarin”— the era after KMT hegemony was established (Peak-KMT rule 1959-1987)**

We wanted to speak not just Mandarin, but good Mandarin. (*Ali*, female, securities broker, 45, focus group #4)

This chapter examines the experiences of people who went to school between 1959 and 1987, the period during which Mandarin had already been established as the dominant language in Taiwan. The first section of the chapter deals with the period between 1959 and 1966, during which time the easing of the Mandarin-only policy and the implementation of land reforms were adopted as new ways to maintain the KMT's hegemony. The second section, the era after 1966, is composed of three parts, which look at the social context, the Mandarin-only policy, and the participants' experiences of living through the era. During this period, the Mandarin-only policy was tightened again, after it had been eased between 1959 and 1966. As will be shown in this chapter, the diplomatic problems that the nation faced during this time, epitomized by it losing its seat to China in the United Nations in 1971, led the KMT to take urgent steps to legitimate itself over the Communist regime on the Mainland. This urgency was reflected in the promotion of the Chinese Renaissance Cultural Movement and the re-emphasis of Mandarin's superior status as the national language. Against this backdrop, the ethnic tensions between Waisheng and Bensheng Ren came to be remade as class differences, in which Mandarin and high Chinese culture came to be seen as of the greatest value, something, as *Ali*'s comments suggest, to which people could and should aspire.

The last section, the conclusion, summarizes the changes happening during this era with regard to home languages and Mandarin, the escalated distinctions between Bensheng and Waisheng in economic and class terms, as well as the participants’ perspectives of Mandarin vs. Taiyu and Waishengness vs. Benshengness. Besides defining “becoming Taiwanese,” these changes also reveal a key dimension about the nature of hegemony—that it must be constantly recreated to remain alive, which means that its construction is never complete.

### About the Participants

Pseudo-nym	Gender	Birth Year	Occupation	Growing-up Place	Family Background	Highest Education	Language Used in Interview	Focus group #
Sam	M	1950	professional	Rural #1	farmers	university	Mandarin + Taiyu	#4
Leaf	F	1950	homemaker	Suburban #3	lumber trade	Junior college	Taiyu	#5
Lily	F	1953	high school teacher	Rural #1	farmers	university	Mandarin + Taiyu	#4
Jo	M	1956	elementary teacher	Rural #1	farmer	teachers’ college	Mandarin	#11
Finn	F	1957	elementary teacher	Rural #1	plumber	teachers’ college	Mandarin	#11
Benny	M	1959	physician	Rural #1	civil servant	PhD	Mandarin	#2
Penny	F	1962	Businessman	Rural #5	unknown	university	Mandarin	#6
Jen	F	1963	high school teacher	Urban #4	civil servant	university	Mandarin	#2
Mont	M	1963	university teacher	Urban #1	unknown	PhD	Mandarin + Taiyu	#6

Jim	M	1964	Self-employed	Urban #1	university teacher	university	Mandarin + Taiyu	#8
Ali	F	1965	securities broker.	Suburban #1	farmers	university	Mandarin	#4

This group is composed of eleven participants who were at elementary school after 1959 and before 1987, with two of them, *Sam* and *Leaf*, overlapping from the previous group. They are included because part of their elementary school experience happened after 1959. The other nine interviewees were born between 1953 and 1965. Six focus group interviews were conducted, with some of the interviews joined by participants from this and other cohorts. *Lily*, a retired high school teacher, was born in 1953 in Rural #1 to a farmer's family. She was fluent in Mandarin and Taiyu, and used both in the interview, where she was joined by her husband, *Sam*. *Jo* and *Finn* are a married couple, and both are retired elementary school teachers. Born in 1956, *Jo* was from a farmer's family in Rural #1. *Finn*, born in 1957, was also from Rural #1, and her father was a plumber. During the interview, both of them used mostly Mandarin, as did other retired teacher participants. *Benny* and *Jen* are a married couple who joined the same focus group interview. *Benny*, born in 1959, was from Rural #1, and his father was a civil servant, while he became a physician. His wife, *Jen*, who was born in 1963 in Urban #4 and whose father was also a civil servant, was a high school teacher. Both of them used Mandarin during the interview. *Penny* and *Mont* are another married couple, and are from Rural #5 and Urban #1 respectively. *Penny*, born in 1962, had a university degree and was a businesswoman. She used mostly Mandarin in the interview. Born in 1963, *Mont* had a PhD degree and was a university teacher. He was interviewed along with *Penny*, and used both Mandarin and Taiyu. *Jim*, born in 1964, joined the focus group interview with his family members, *Tamu*,

*Yinno*, and *Daisy*, who were in the Japanese group. *Jim* was born in Urban #1, graduated from university, and was self-employed. He used both Mandarin and Taiyu in the interview. The last participant of this group, *Ali*, was born in 1965 in Suburban #1. Both of *Ali*'s parents were farmers. *Ali* had a university degree and was a securities broker. She used mostly Mandarin in the joint interview with *Sam* and *Lily*.

Overall, this sample had the highest level of education, compared to the other groups, and is made up of the largest number of professionals. The two retired elementary teachers graduated from teachers' college, two others had a PhD degree, and all of the others had at least a university or college degree.

### **Before 1966—New Ways of Creating Hegemony**

#### **Loose Enforcement of Mandarin-only Policy**

During the era 1949-1958, the hegemony of Mandarin and the KMT was being fully established, which made several academics writing in 1970 look back on the 1950s as the peak years of the Mandarin-only policy. As the author Bi-Guang, writing in an academic journal *Zhongguo Yuwen (Chinese Language and Literature)*, noted, during the 1950s people took pride in speaking Mandarin, and it was the common language used in schools (Bi, 1970). As mentioned at the beginning of the previous chapter on the years between 1949 and 1958, Bi-Guang contrasted his memories of the Mandarin campaign in his childhood and at this stage. Whereas in the former people used it everywhere, even at home, and would teach their family members how to speak it, he observed that the enforcement of the Mandarin-only policy seemed to have slackened after about 10 years of strong enforcement (1949-1958). This was probably because Mandarin had achieved dominance in public

spheres in the 1950s. This view was commonly found in documents published in the 1970s, which reviewed the Mandarin policy and contrasted two eras, the peak period from 1949-1958, and the more liberal one from 1959-1966.

One account from the times was written by a legislator Mu-Chao (1970a), who criticized the government's policy of accommodating dialects, as this suggested that Mandarin was not as important as before. This, and other similar documents, argue that the situation had changed for the worse, and that in order for Taiwan to return to its earlier glory, it would need to adopt stricter measures again. An article in the same journal called the Mandarin campaign "one of the most important issues in the history of ROC." It claims that Taiwanese people had achieved a sense of solidarity by speaking the national language, but notes that the Mandarin campaign seemed to have weakened, which was said to worry people with "vision" ("Zhonghua minguo kaiguo yilai de yijian dashi [One pivotal issue after the founding of R.O.C.], 1971).

Several reasons may have accounted for the slackening of the policy from the late 1950s to the mid-1960s. One of these is simply that some loosening of it was to be expected after it had achieved its goal of encouraging the widespread use of Mandarin. In addition, as will be shown in the next section, land reforms that produced a new Taiwanese middle class and made their culture and language more visible also played a part in the easing of the policy. But whatever the reasons might have been, according to the documents, the policy was then enforced more strictly after 1966. Considering that the Mandarin-only policy was always one means for the KMT to establish its hegemony, the re-vitalization of the policy at this time made sense. As mentioned earlier, when the Nationalists lost "the rest of the nation"

in the battle against the Chinese Communist Party and withdrew to Taiwan, they sought to instill in the Taiwanese population a new national identity, one that required a new linguistic identity immersed in a nationalistic discourse, in order to legitimate their rule of Taiwan. Even after Chiang Kai-shek officially relinquished the plan to recover the Mainland in 1959, this nationalistic discourse continued to be part of people's lives until the lifting of martial law in 1987. At the same time, the massive influx of Chinese Mainlanders, and the discrimination that the Taiwanese suffered in the wake of this, as well as the White Terror, meant that many people had long-standing resentments towards the government and Waisheng Ren, the people it was thought to represent. Finally, the depressed economy of the 1950s also added to these tensions. In this context, the KMT implemented a series of measures to enhance its hegemony, which included the implementation of land reforms.

### **Land Reforms**

The land reforms of the 1950s and 1960s, which were based on the KMT's Mainland experience, profoundly reshaped Taiwanese society and enabled some Taiwanese people to enter the elite class. The KMT's defeat on the Mainland was partly due to the wide support for the Communists, which had in part been won by the land reforms they implemented. Impressed with the power of such reforms, when the KMT came to Taiwan they adopted similar policies in the 1950s. Therefore, on the one hand land reforms were the extension of the antagonistic situation between the Nationalists and the Communists; on the other hand, they were a measure used by the KMT to establish and maintain its dominance in Taiwan (Y. Yang, 2008).

Following the Retrocession, farm lands in Taiwan were in the hands of only a few

people, many of whom became large landowners by seizing the property of the Japanese who had fled. With more than one-third of the farm land owned by only 2% of the population, a vast number of farmers worked on rented lands and paid a large proportion of their income to the owners. Starting from 1949 and extending through the 1950s and 60s, the KMT put in place a series of land reforms, including the 375 Farm Rent Reduction Act of 1949, the Sale of Public Land of 1951, the Land-To-The-Tiller Program of 1953, and the second stage farming land reform of the 1960s (Y. Yang, 2008). These land policies were carried out with the assistance of the Sino-American Joint Commission on Rural Reconstruction, with the aim of empowering the farmers, while at the same time disempowering the few land owners who were indigenous Taiwanese. It took time for the effects of these policies to be revealed, but their impacts on Taiwanese society were profound. These radical policies, however, did not meet much resistance from the populace. One major reason for the smooth implementation was because the policy executors, the KMT, were mostly from the Mainland and had few ties to the large indigenous landowners. Through the land reforms, the KMT was able to disassemble a powerful source of nativist feelings, while also empowering disadvantaged farmers, thus winning the favour of the latter group. These policies increased farmers' incomes and improved their lives, leading to the rise of a new middle class that was less likely to oppose the KMT administration. Moreover, rising social consciousness also led members of this new class to seek political empowerment, and thus the authorities had to accommodate them within the KMT system. The culture and language of this class, Taiyu, therefore also became more visible, and this was both an accommodation to the majority Taiwanese population, and also an easing of the Mandarin policy. In addition, the redistribution of land and social capital that these policies enabled



helped the development of industrialization in Taiwan, by freeing up new sources of investment capital. This policy laid a solid foundation for Taiwan's industrialization and economic success.

### **After 1966**

However, after the slackening of the Mandarin-only policy from 1959 to 1966, it then became stricter again. The main cause of this was the diplomatic setbacks of the 1960s and 70s, culminating in China replacing Taiwan in the United Nations in 1971, and thus there was a great need for Chiang Kai-shek and the KMT to reassert their legitimacy as the only guardians of Chinese heritage. Lack of direct experience of significant conflicts with Waisheng Ren, along with the once again aggressively imposed Chinese nationalism, led people who grew up during this era to more readily adopt a Chinese identity, as well as to accept the dominance of Mandarin as natural, and thus the suppression of home languages and Taiwanese culture. Speaking good Mandarin was again taken as a sign of authentic Chineseness, and thus became the aspiration for many people who wished to get ahead in life, and who had few memories of how unnatural this actually was in Taiwan.

### **Social Context**

#### **Frustrated diplomatic relationships.**

Following the harsh post-war times of the 1950s and early 1960s, the era the peak-KMT group grew up in, the late 1960s and 1970s were also difficult years. While the war-time shortages of food and resources had become things of the past, life was still hard, with the economy struggling to grow. In addition, the state was facing many challenges, both domestically and internationally, which required it to take measures to sustain and

solidify the idea of nationhood. Against this backdrop, the Mandarin-only policy and Chinese Culture Renaissance Movement were both revitalized after the more liberal period from 1959 to 1966.

Ever since the founding of the PRC in 1949, the “two China’s” had been in competition with each other for international recognition. Unfortunately, in the 1960s and 1970s, Taiwan faced severe setbacks in the international sphere, with major powers like France and Japan successively turning from the ROC and recognizing the PRC as the “real China.” In 1971, the ROC left the United Nations when the PRC was recognized as the legitimate holder of China’s seat, and in 1979 the United States also switched its recognition from Taipei to Beijing (“Taiwan jianshi—Zhonghua minkuo [Brief history of Taiwan—Republic of China],” 2004). It was against the backdrop of these setbacks that Mandarin and Chinese nationalism were forcefully re-imposed on the Taiwanese, and thus a Chinese identity was more readily adopted by people during these years.

The diplomatic problems that Taiwan faced, however, led many people to wonder where they belonged and who they were in the eyes of others. They started to take a serious look at the land beneath their feet, the land they grew up on but had previously ignored. Starting in the late 1970s, Taiwanese literature, which had been suppressed for decades after the 228 Incident, began to gain more readers. Before this time, the only voices heard were anti-Communist and Waisheng [Mainland Chinese] ones (Lan, 2009; Peng, 1991; Ying, 2009), and for the KMT the rise of local literature and native consciousness were intolerable, as both threatened its goal of making Taiwanese people accept a Chinese identity. As a result, literary localism was suppressed by the government.

### **The Chinese Culture Renaissance Movement.**

In the face of the external setbacks, the KMT government tried to inspire a sense of belonging among the Taiwanese by enhancing their links with Mainland culture through the “Chinese Culture Renaissance Movement” of the 1960s and 1970s. There are a number of different perspectives on this movement. Some view it as merely a reaction to the Chinese Cultural Revolution that was launched by Mao Ze-dong at about the same time in Mainland China (Gong, 2000; G. Lin, 2011), while others regard it as an independent act by the KMT’s one-party dictatorship. Still others see it as a sincere move by Chiang Kai-shek to solve the problems that the new nation-state encountered during the process of modernization (Tozer, 1970). However, whatever the other underlying motivations, the nationalistic nature of this campaign cannot be ignored. As Tozer argues, due to the KMT’s sponsorship, “the Cultural Renaissance has become primarily a political rather than an intellectual or cultural movement” (1970, p. 81). As its name suggests, the movement aimed to restore Confucianism, Chinese classical literature and traditional Chinese customs and morals, to link Taiwanese people to their supposedly Chinese heritage, and thus enhance their sense of Chineseness (G. Lin, 2011). However, the real goal of the movement was to legitimate Chiang Kai-shek and the ROC government as the guardians of Chinese heritage, in contrast to the apparent rejection of this heritage on the Mainland during the Cultural Revolution (*Ibid.*). Note that no part of this movement was dedicated to emphasizing the value of Taiwanese culture, or of unifying Taiwanese and Chinese cultures, as the sole focus was on the Mainland.

The movement was launched on November 1966, on the 100th anniversary of Sun Yat-sen’s birthday, which according to Chiang Kai-shek, had special meaning because Dr.

Sun and his “Three Principles of the People” had been able to sustain Chinese traditions (so-called “daotong” in Chinese) and save Chinese culture from extinction at the hand of the Communist Party (Tozer, 1970, p. 83). Chiang himself was the head of the movement’s Promotion Council, the principal agency of the campaign, which was founded on July 28, 1967. Ten goals were announced for the movement, with the top one being the promotion of school and family education, with an emphasis on Confucianism. Other goals included utilizing the mass media for the promotion of a cultural renaissance, which included encouraging good morals and launching government planning and the construction of new theaters, opera houses, auditoriums and art galleries throughout the country, in order to disseminate Chinese art forms, such as Beijing Opera (S. N. Wang, 1981).

The Ministry of Education played an important role in implementing the campaign in schools, and thus promoting youth participation. Specifically, the ministry launched the New Life Movement at the school level to support the Cultural Renaissance Movement. This movement was an extension of the KMT’s New Life Movement, which had been implemented on the Mainland between 1934 and 1949, and emphasized revitalizing traditional virtues and morals to guide modernization, such as using the “Four Social Anchors and Eight Virtues” to serve as the moral foundations of society (Qin, 1984). In addition, in order to help promote cultural activities, the Council for Chinese Cultural Renaissance was established under the Cultural Bureau of the Ministry of Education in November 1967. Officially, the bureau was to promote and encourage “good” art forms, but in practice it became an institution with broad power to censor radio, TV, cinema, and mass media on behalf of the state, and to impose the dictates of the KMT and the Cultural Renaissance campaign on the populace (G. Lin, 2011). The promotion of the Beijing Opera

is an example of the subtle influence that the Cultural Bureau exercised on the public. Therefore, as one of the research participants, *Benny*, remembered, there were much more Beijing Opera shown on TV and in the theaters than was the case for Taiwanese Opera (*Benny*, male, physician, 51, focus group #2).

As a result, the forceful instillation of Chinese culture, literature, customs and morals on a daily basis was a characteristic of this era, with an emphasis on Confucian orthodoxy, the “Three People’s Principles,” and Sun Yat-sen’s thoughts. A textbook issued by the National Institute for Compilation and Translation under the Ministry of Education, titled *Chinese Cultural Renaissance Movement Basic Materials* (National Institution for Compilation and Translation, 1971), was mandated for use in the curriculum, and became part of the university entrance exam. These *Basic Materials* mainly advocated Confucianism. According to the interviewees, they not only studied and memorized classical Chinese literary works, Confucian dictates, the Four Books and Five Classics, in order to pass exams, but also pledged support to the New Life Movement, and dedicated themselves to practicing traditional values and morals in daily life. They remembered having to memorize “Ten Youth Life Principals,” which set out the morals by which young people were supposed to live. They also remembered pledging support for the nation on a regular basis, in particular in school assemblies. In addition, competitions relating to Chinese culture and the New Life Movement, including ones on speech, composition, calligraphy and even public hygiene, were held at all levels, from individual to school, and from city-wide and nation-wide, to ensure that the campaign touched the lives of everyone.

Due to the propaganda that highlighted Taiwan's links with Mainland China, and also legitimated the ROC government as the guardians of Chinese heritage, the interviewees were deeply influenced by Chinese nationalism, as most of them "naturally" regarded themselves as Chinese, as revealed in their accounts. However, as some of them also mentioned, this was an era when opposing forces, such as local literature, native consciousness, and Taiwanese nationalism, started to gain power. However, as martial law and the White Terror did not allow any dissent, many people who called for Taiwanese democracy, so-called "Dangwai people [Outside the KMT Party]," had to flee overseas and carry on their work there. The intensifying democracy movement within Taiwan in the late 1970s eventually led to the birth of the major opposition party to the KMT, the Democratic Progressive Party (DPP), in 1986 (X. Li, 1987; L. Zhang, 2009).

#### **Neutralized Bensheng-Waisheng relationship.**

Compared to those who went to school in the 1940s and 1950s, in this era the relationship between Bensheng Ren and Waisheng Ren seemed to be less antagonistic, with the interviewees recalling few messages from their parents that negatively influenced their getting along with Waisheng students at school. Indeed, none of the eleven interviewees who went to school during this era stated that their parents disliked Waisheng Ren, nor did they say that they themselves had any ill feelings towards them. However, *Jim* did mention that one of his classmates had a strong hatred for Waisheng Ren, saying, "Probably due to his bitter experiences of being bullied and excluded by Waisheng children, he had a strong dislike for them." But even he was quick to add, "I myself lived in the urban area, where the few Waisheng Ren I contacted were different from those living in the Waisheng

community. Therefore, I did not have the strong resentment toward Waisheng Ren that my classmate did” (*Jim*, male, self-employed, 46, focus group #8).

The testimonies of those who went to school during this era thus reveal a change in the Bensheng-Waisheng relationship. While discrimination against Bensheng Ren remained a fact of life, feelings toward the dominant group did not seem to be as acute as before. This may be due to several reasons, as follows. First, the Retrocession and the 228 Incident had happened 20 years earlier, before interviewees in this group were born, which meant that the events were much less vivid for them than for the early-KMT and mid-KMT groups. In addition, the parents of some of these interviewees also might not have had personal experiences of the 228 Incident or of being directly victimized by the KMT regime, as they may have been too young when such things occurred. It thus makes sense that the members of this group did not have very strong negative feelings towards the Waisheng Ren. Second, even if their parents or other family members did have experiences of being victimized, and thus disliked Waisheng Ren, it is likely that they, like most Taiwanese people, compliantly accepted the fact that the Mainlanders were not going to leave, given the increasing number of intermarriages between the two groups. Third, under the impact of martial law and the White Terror, most people chose to keep silent about sensitive political topics, such as Bensheng-Waisheng relations. Not only were parents silent about these issues, but teachers also never talked about them, as illustrated in the following accounts.

*Mont* recalled, “I don’t remember any of our teachers talking about these things. They did not even speak any Taiyu in class. If they did [talk about the sensitive topics], they would be taken away by the KMT” (*Mont*, male, university teacher, 47, focus group #6).

*Penny* had similar memories (*Penny*, female, businessman, 48, focus group #6), while *Benny* remembered a teacher, a family acquaintance, who was jailed twice for criticizing the KMT in class (*Benny*, male, physician, 51, focus group #2). In contrast, most teachers chose to keep silent or avoid talking about Taiwanese consciousness, as *Jen* recalled, “Yes, at school, no teacher would talk about Taiwanese identification or local awareness” (*Jen*, female, teacher, 47, focus group #2). Not only did school teachers in public spaces not talk about sensitive political matters, but parents in private realms also kept silent. When asked by the researcher whether he had ever heard any comments on the KMT or the 228 Incident from his parents, *Jo* replied, “I never heard them mention that, and I don’t think they would talk about them back then” (*Jo*, male, teacher, 54, focus group #11).

In addition to parental attitudes and behaviors, the successful promotion and the forceful imposition of a Chinese identity shaped the life-course identities of the interviewees, and played a part in softening relations between Bensheng Ren and Waisheng Ren. For example, the monolingual policy had been in place for about 20 years, and while home languages were still spoken, Mandarin was mainly used in public, and even began to be used more often in private spaces. Several of the people who were young during this era said they used some Mandarin with their siblings, and even with their parents. In terms of language use, for the peak-KMT group home and school did not seem to be as separate as for the previous groups. The use of Mandarin as the common language thus helped to resolve the conflicts that were so common in earlier years.

The imposition of Chinese nationalism through the “Chinese Culture Renaissance Movement” and other propaganda in the 1960s and 1970s reinforced the interviewees’ sense



of Chineseness, and this may have blurred the lines between the ethnic groups, and thus eased tensions. As mentioned earlier, memorizing classical Chinese literature and Confucian principles were part of the shared memories of the interviewees growing up at this time. As *Benny* commented, the curriculum emphasized Chinese culture, morals and heritage, and taught students that they were Chinese, “At that time, we were always taught that we were Chinese at school. How could you not think that you were Chinese?” Even here, though, he recalled being uncomfortable with some aspects of the policy. “There were many Beijing Opera programs on TV.” He added, “We hated the Beijing Opera, because we never understood what they were about” (*Benny*, male, physician, 51, focus group #2).

When seen across the groups, *Benny*'s complaint here and the resistance of *Ji* from the Mid-KMT group against the banning of speaking home languages at school can possibly signify a gender difference, in which males are more rebellious and females more obedient or males reported their “rebellious acts” but females were reluctant to do so.

It should also be noted that most of the interviewees in this Peak-KMT group had higher educational levels and social statuses than those in the other groups, and thus may have been more deeply exposed to the effects of hegemony in the process of building their careers. Therefore, a member of the elite class, like *Benny*, who bought into the system but still resented some aspects of the Mandarin-only policy when he was a student, actually testifies that the learning of Mandarin was not natural.

## **Mandarin-only Policy and Its Discourse**

### **State policy.**

During this era of diplomatic problems the ground was paved for the harsh re-imposition of the Mandarin-only policy between late 1960's and the lifting of martial law in 1987. Specifically, in 1967 the provincial and municipal Mandarin Promotion Councils were resumed, followed by the "Reinforcement of Mandarin Promotion Law" in 1970, which was passed as one of the key measures to support the "Chinese Culture Renaissance Movement" (M. Chen, 1998).

Due to the nationalist and Sinicized nature of the Mandarin-only campaign, as shown in the academic discussions reviewed below, home languages were seen as the barrier to the success of the monolingual campaign, and thus government efforts were dedicated to discouraging the use of them. This led to the "Radio and TV Act," passed in January, 1976 (Q. Li, 1995; M. Chen, 1998). The Act, which was proposed by the Information Bureau under the Executive Yuan, worked in support of the Mandarin-only policy of the Ministry of Education, and strictly censored the contents of the programs in non-Mandarin languages (M. Chen, 1998). In particular, Article 20 of the 51 Articles in the Act specified Mandarin as the primary language of radio and TV broadcasts, and proposed reducing the time allocated to non-Mandarin programs to less than one hour a day, with the aim then being to gradually eliminate all such programming from schedules. This Article had a substantial impact on the sustainability of home languages, in contrast to the privileging of Mandarin. Even after the lifting of martial law in 1987, Article 20 was not abolished until 1993 (M. Chen, 1998).

### **National language vs. dialect.**

Mandarin-only discourse dominated Taiwan during this era, with official documents, newspapers and journals weaving several primary themes to neutralize, normalize, and revitalize the monolingual policy.

For example, newspapers in these years emphasized the importance of a standardized national language, and the risk of not having one. Journals were also characterized by the call to clarify conceptions/ misconceptions about Mandarin and dialects. For example, a number of “facts” were promoted and explained in the media, such as “the natural evolution of Mandarin into the national language,” “the righteous choice of Mandarin as the national language over other dialects,” and “the error of learning Mandarin via dialects.”

On September 7, 1972, *United Daily News* published an article by Li Ben-jing, “Yige Jianyi—Guanyu Tuixing Guoyu De Wenti [A suggestion—About the issue of promoting Mandarin],” which argues that the distinction between “national language” and “dialect” was that the former signified the unification of a nation, while the latter hindered communication and mutual understanding, and thus became a barrier to solidarity. Li said, “We should never think that speaking dialects is not a big deal. It is, because it severely damages solidarity” (B. Li, 1972).

Tian Shun-zhi, an author writing in the academic journal *Taiwan Jiaoyu Fudao Yuekan* (*Taiwan Education Report Monthly*), first clarifies the definitions and statuses of “the national language” and “dialect,” and then presents the reasons for having a national language. “A national language was needed,” he writes, “not only because communication problems could occur due to the vast territory and great variety of ethnicities and dialects in

China, but also because a common language also promoted democracy and inspired solidarity” (Tian, 1978, p. 16). Tian argues that the promotion of Mandarin is an entirely positive thing, while Wang Meng-wu, writing in *Zhongguo Yuwen (Chinese Language and Literature)*, further claims that “no dialects could compare to Mandarin after the latter had been lifted to the status of national language” (M. Wang, 1982, p. 26). He also dismisses the idea that dialects could aid the learning of Mandarin, by claiming that in practice few people actually acquired it this way (M. Wang, 1982). However, it should be noted that this conflicted with the testimonies of the interviewees in this work, who claimed that the home languages helped in their transition from Japanese to Mandarin, as discussed in the previous chapters.

Hence, as we can see in both previous eras and the one currently being discussed, based on the interests of the state, home languages were generally dismissed in both newspapers and journals, as well as the wider media, in order to promote Mandarin, with the authorities looking to academic and popular discourses to disseminate hegemony and sustain the concept of nationhood. Since all publications and the media were censored at this stage, these representations are not surprising, and this can be seen as illustrating what Billig argues about language as a creation of nationalism (Billig, 1995).

### **Home language linked with backwardness and vulgarity.**

In public discourse, not only were home languages represented as provincial and unable to represent the nation, but more generally as backward and old-fashioned, and the use of home languages was blamed for a number of social problems, as well as students’ poor performance in Chinese tests.

The *Central Daily News*, for example, published an article entitled “Tuixing guoyu yundong, huyu dianshi jian fangyan [Enforcing Mandarin-only campaign and cutting down on the use of dialects on TV]”, which claims:

TV is the most powerful tool to promote Mandarin... The increasing number of TV programs using dialects was having negative effects on both Mandarin promotion and public morality... TV programs using dialects should be prohibited because the inferiority and backwardness of home languages impaired the advancement of society, in contrast to the refined nature and high quality of Mandarin broadcasts, which were thus seen as more progressive. (1972, p. 4)

Negative representations of dialects continued to appear in newspapers during these years, and the “backwardness” of home languages “justified” the banning of the use of dialects.

### **Prevalence and authenticity.**

Academic discourse at this stage not only praised the achievements of the Mandarin-only policy, and reminded people of the necessity to continue these efforts, due to the growing popularity of dialects during the slackening years 1959-1966, but also pointed out that the pursuit of authenticity was the next goal after the Mandarin dominance had been achieved. In other words, just being able to speak Mandarin was not enough, as people needed to speak good Mandarin. Also writing in *Zhongguo Yuwen (Chinese Language and Literature)*, Liu Wu-qing, for example, argues that “it was not right to see the Mandarin campaign as having accomplished its aims, as constant reviews and reinforcements of it were needed to ensure its success” (Liu, 1981, p. 16).

In an article in the same journal, which talks about promoting Mandarin as a form of social education, Nong Yu-jiao points out while many people could speak the language, they did not speak it well, which according to him meant using the “standardized pronunciation” and “correct syntax.” In his view, “this was due to interference from dialects, such as store signs which mixed Mandarin and dialects together, and led to some confusion” (Nong, 1986, p. 19). This call for authenticity had a great impact on society, as is shown by the comment at the beginning of this chapter that speaking good Mandarin was a key goal of students during this era.

### **Language linked with nationalism, localism and separatism.**

As mentioned above, nationalist representations of speaking Mandarin vs. dialects were commonplace in the newspaper and journals throughout the Mandarin-only period. The works of Liu (1981) and M. Wang (1982), two of the authors mentioned above, are typical of this era. According to Liu, Mandarin was needed because it enhanced national solidarity, and thus national security. Wang equates the Mandarin campaign with the founding of the ROC, calling them the two most pivotal events in the nation’s history, and equating language standardization with territorial unification. He also argues that “Language standardization had to be completed in Taiwan before the Mainland could be retaken, as it is an inspiring symbol that could aid the territory unification” (p. 23).

In two journal articles, legislator Mu-Chao argues that the increasing use of dialects by the general public, coupled with ignorance as to the significance of Mandarin promotion, had led to weak national identification and strong localism, thus impairing solidarity (Mu, 1970a; 1970b).

Another article that typifies the dominant thinking at this time is Wang Meng-wu's "Fanyan boyin yu tuixing guoyu [Dialectal broadcasting and Mandarin promotion]" in *Zhongguo Yuwen (Chinese Language and Literature)*, which argues:

Since most people can understand Mandarin now, there is no need for radio broadcasts to use dialects. Tolerance of dialect use in the media will make people think that speaking Mandarin is not important... In the transitional stage, dialects can help people learn Mandarin, but now since the stage is over, dialects should not be used in TV and radio broadcasts... This not only threatened the promotion of Mandarin, but also damaged national solidarity. (M. Wang, 1970, p. 8)

A report in the *Central Daily News* titled "Guoyu jiaoyu de wei ji [Crisis of Mandarin education]" argues that the increasing use of dialects by the public, and especially by students, teachers, and in the mass media, is worrying to those in Taiwan with a greater vision, and thus the author strongly advises the Ministry of Education to regulate the use of dialects on TV and radio ("Guoyu jiaoyu de wei ji [Crisis of Mandarin education]," 1970, p. 6).

Likewise, in an article ("Geshuo gehua—Wokan dianshi fangyian jiemu [Opinions—How I see the dialectal programs on TV]") published in *United Daily News*, Wang Da-kong suggests that "the number of TV programs using dialects be restricted, not only because such programs were vulgar and coarse, but because the use of such languages caused divisions and damaged solidarity" (D. Wang, 1972).

As shown in the above examples, in public discourse that called for banning the use of dialects, these languages were represented not only as being backward and barring smooth

communication among people, but also as inspiring a dangerous localism and separatism. In contrast to the supposed evils of dialects, Mandarin was represented as inspiring the sense of belonging and national solidarity. Mandarin was thus linked with patriotism and, along with the national flag and national anthem, was seen as a symbol of nationhood. Mu (1970b), for example, makes two key points. First, language unification led to solidarity and prosperity, and thus was a global trend. Second, speaking the national language was the duty of all citizens, just like respecting the national anthem and national flag.

This nationalistic perspective was reflected in the media's severe criticism of two councilors who used Taiyu in the provincial council, which was attacked for "damaging national unity." *United Daily News*, for instance, claimed that their action "has provoked criticism from all walks of life, especially from Bensheng people" ("Tuixing guoyu, zengjin tuanjie, guangda duzhe toushu, qiangdiao tongzhou gongji [Promoting Mandarin, fortifying solidarity—large number of readers sent letters to emphasize solidarity]," 1977, p. 3). Similar criticisms were seen in Tian (1978), as mentioned above, which attacked the two councillors for breaking the Mandarin-only policy that prevailed in such meetings, noting that this "was rude for not taking into consideration those who did not know Taiyu" (p. 14). Ten years after the incident, *Central Daily News* still criticized the Hakka and aboriginal councilors "who followed the two provincial councilors' lead and started to speak their home languages in assemblies," and condemned this for "inviting separatism and discord" ("Tuixing guoyu bingfei paichi fangyan [Promoting Mandarin does not equal negating dialects]," 1987, p. 2).



Anti-KMT groups, especially in the 1980s, often linked the issue of language to those of nationalism and separatism, and promoted Taiyu as a symbol of Taiwanese identity, a move that encouraged a fierce response from nationalist critics. For example, M. Wang (1982), as mentioned earlier, equates the standardization of Chinese languages with the unification of Chinese territory, and sees support for Taiyu as a way of advancing a divisive Taiwanese nationalism. When four “Dangwai [non-KMT/ anti-KMT]” legislators made a statement in Taiyu calling for “Taiwan’s future determined by Taiwanese people,” newspapers represented their behavior and Dangwai advocacy as separatism, saying that they were “destroying social harmony.” In a letter from the reader titled “Shemo qiantu yingyou taiwan renmin jue ding? [What future should be determined by Taiwanese people?]” in *Central Daily News* (1982, p. 3), the ROC Constitution was referenced to question the logic and legitimacy of “self-determination of Taiwan’s future.” It concluded by charging the legislators’ actions as “no different from those who advocated an independent Taiwan, and thus deserving of severe censure.”

In newspaper representations, speaking Mandarin was related to patriotism, solidarity, and social cohesion. Speaking dialects, on the other hand, was blamed for destroying solidarity and provoking separatism, and this was used as another excuse, besides the “backwardness” of dialects, to dismiss appeals to increase the number of broadcasts in such languages on TV and radio. The *United Daily News* published letters from its readers to underline its editorial views, one of which used the examples of Canada and Singapore to show that the difference between the two states, with the former suffering from separatism while the latter was secure in unity, lay in the fact that the latter had a unified national language, while the former did not (1980, p. 3). Note that Singapore had gone through a

successful process of making Mandarin one of its official languages, while adopting English as its de facto national language (L. Hong, 1996), and so it was singled out by the newspaper for favourable comment, although, given the multilingual nature of this city state, it is perhaps a bad example to use in support of a monolingual policy. The letter thus concluded that “there was no point in sacrificing solidarity by increasing the number of TV and radio programs in dialects, just to accommodate the small number of people who did not understand Mandarin” (“Cujin quanmin gengjia tuanjie, tuixing guoyu gengyao jiaqiang [Reinforcing Mandarin to bring solidarity, setting up Taiyu channels is a backward idea],” 1980. p. 3). But as will be shown later in the interviewees’ accounts, people were concerned about the needs of the elderly when it came to dialect broadcasts, and thus this is a clear example of the state’s interests being put ahead of those of its citizens.

## **What the Participants Remembered**

### **Parents, education and languages.**

For the interviewees from this era, Taiyu was the dominant language at home, and parental attitudes towards it were very much like those of the previous generation. That is, it was the language that they, the parents, were born with and naturally used with family members, so it never occurred to them that they needed to preserve it to assert their Taiwanese-ness. *Jo*’s response about parental attitudes towards Taiyu and Mandarin was typical, “Parents did not have a special perspective toward Taiyu. Nor did they emphasize the importance of passing it on in the family. We just naturally spoke it in our family” (*Jo*, male, teacher, 54, focus group #11). *Mont* assumed his parents took Taiyu as a part of their identity, although they never asserted it in this way. He added that they may have thought that Taiyu should be passed on in the family, but they did not actually strive to do it, “They

should have thought so. But they still would speak Mandarin with their grandchildren, who couldn't speak Taiyu. My son did not speak Taiyu, but my daughter could, as she was brought up by my parents" (*Mont*, male, teacher, 47, focus group #6). This seems to reflect the general attitude of parents towards home languages; that is, while it would be best if Taiyu could be passed down in the family, they would not interfere with their children or grandchildren's language learning just to preserve it. *Penny's* comment on her parents' attitude best illustrates this, "They were not resistant. They knew that the new government [i.e., the KMT, which arrived in 1949], new policy, and new rules had replaced the old ones, and that it was natural to learn the language of the new governing people" (*Penny*, female, businessman, 48, focus group #6).

*Penny's* statement reflects a common attitude that went through all the age groups, and this is that the main aim that people had was simply to survive and do well, and become empowered, and thus they did whatever was needed under the new regime. Parents followed the state's language policy because, as noted earlier, they believed that education was the best way to overcome illiteracy and poverty, and that learning Mandarin was the key to effective schooling. In other words, it was the desire for empowerment that worked behind the adoption of Mandarin. As a result, according to *Jim*,

We just followed the tide then, feeling that learning Mandarin would probably lead to a better future. That was why people complied with the language policy. In order to have a promising future, you just would learn Mandarin for the benefits linked with it. (*Jim*, male, self-employed, 46, focus group #8)

*Benny* echoed this view, “Parents thought that Mandarin was education, a sphere separate from family. After all, no Mandarin, no schooling” (*Benny*, male, physician, 51, focus group #2).

The desire for their children to become empowered in the changing society was so strong that parents completely trusted school and teachers. Indeed, all of the interviewees indicated that their parents fully supported this policy, even if they themselves spoke little or no Mandarin. *Finn*’s parents, for example, only learned Mandarin later on, but, “They were very supportive of what the teachers taught us” (*Finn*, female, teacher, 53, focus group #11). *Jo* added that his parents were able to speak a little Mandarin later on, but they seldom used it. In spite of that, he said, “They accepted everything the school taught us, because they wanted us to have education” (*Jo*, male, teacher, 54, focus group #11). In a different interview, *Jen* further said, “Unlike modern parents, parents were fully compliant to school policies without questioning” (*Jen*, female, teacher, 47, focus group #2). Parents wanted their children to learn Mandarin because this meant they could get an education, and thus a better chance of a good life.

Although Taiwan’s economy had improved somewhat at this time, life was still a struggle for many people. Accordingly, parents, especially those in rural areas, often had to spend all their time working, and thus had little choice but to trust the education of their children to the school system. *Jo* talked about his parents’ attitudes, which were also held by other parents of the interviewees in this group:

Parents were too busy making a living. They did not have time caring about what the school taught us. But they wanted us to listen to the teacher. They would ask teachers to spank us if we did not behave. (*Jo*, male, teacher, 54, focus group #11)

Parents were thus able to separate the two different spheres for home languages and Mandarin, and did not interfere with their children's use of these. While this was similar to what the parents of the people in the previous groups did, one difference, as revealed by *Finn* and *Jo*, for example, was that their parents were able to use some Mandarin themselves. *Jen*, the only participant whose parents spoke almost only Mandarin at home, said that her father was a civil servant who also used the language at work. "As far as I remember, I used Mandarin at school as well as at home. I think it was because of the Mandarin policy. I am not sure whether we used Taiyu at home before my sisters and I started school" (*Jen*, female, teacher, 47, focus group #2).

Since the participants in this group generally ended up in one of the professions, and thus had relied on schooling to get ahead in society, and many of their parents were from the middle classes, and so also very supportive of their education, it is reasonable to assume that *Jen* is not an exceptional case in this group. In contrast, *Jo* said that he and his siblings would speak Mandarin at home when they wanted to communicate secretly, without letting their parents know.

The accounts related in this section show how the participants were exposed to the effects of hegemony, both in and outside school, which, during this era, were no longer seen as separate spaces in terms of Mandarin use.

### **Getting along with Waisheng students.**

As mentioned in an earlier section, the less tense relationship between Bensheng Ren and Waisheng Ren for the interviewees from this era is likely because their parents did not pass on any tradition of ethnic conflict to them. It may also have been due to the lessening of cultural differences between the native Taiwanese and second generation Waisheng Ren, who had also been born in Taiwan and were the classmates of these interviewees, as well as the fact that most Bensheng students also spoke Mandarin and had adopted Chinese culture and values. Accordingly, unlike those who went to school during the 1950s, who had a clear sense of the tensions that existed between the two groups, both from their own experience and the attitudes of their parents, none of the people who went to school in this later era mentioned that Bensheng and Waisheng Ren did not get along at school. Some even said that they were not even aware that there were Waisheng students around them. *Jo*, for example, did not feel his Waisheng classmates were different to the Bensheng ones (*Jo*, male, teacher, 54, focus group #11). *Jen*, who was from the city, also said that her classmates got along so well that she did not feel they were from different ethnicities (*Jen*, female, teacher, 47, focus group #2). Similarly, *Mont* stated, “Indeed this is often the case. We did not know who was Waisheng” (*Mont*, male, university teacher, 47, focus group #6).

While others stated that they had no problems getting along with their Waisheng classmates, they did say that there were clear economic and social differences between the two groups. For example, *Finn*, *Benny* and *Ali* all felt that their Waisheng classmates were different from themselves, and that their Mandarin seemed to be more refined than their own. In the same focus group in which *Jo* stated that he did not feel the Waisheng students were different to the Bensheng ones, *Finn* gave the opposite opinion, as follows:

I felt they [the Waisheng students] were more ambitious and outspoken than us, probably because of their family backgrounds—their parents struggled to come here and they were so far away from their hometown. I remembered a classmate of mine in teachers' college [*Finn* went to college in the mid-1970s], who did not speak Taiyu at all, which kind of made us feel he was different from us. (*Finn*, female, teacher, 53, focus group #11)

*Benny* also remembered that they were different, “Whenever there was a Mandarin speech contest, we [Bensheng students] did not have a chance. They were from higher cultural level and they spoke good Mandarin” (*Benny*, male, physician, 51, focus group #2). Meanwhile *Ali* noted:

Their economic situation was much better than ours, as they had more allowance to spend. Their parents paid more attention to their school work. Bensheng parents would often want us [girls] to help support our family by going into the workplace soon after we finished elementary school or junior high school. (*Ali*, female, securities broker, 45, focus group #4)

Therefore, many Bensheng students were keenly aware that they had fewer options and opportunities than their Waisheng classmates.

As seen from the accounts given above, ethnic distinctions still remained in this period, but less so linguistically and culturally, and more socially and economically. However, the class aspect of the Bensheng-Waisheng distinction was already apparent to some of the interviewees who went to school in the 1950s such as *Grace*, *Shine*, and *Chen*, and this issue will be discussed in more detail in Chapter 8.

In addition, the representations of characteristics associated with Waisheng Ren, such as Mandarin, showed them as being positive and progressive, and this affected how people perceived their home language and culture, and made it easier for the children of this era to acquire a Chinese identity.

### **Learning Mandarin.**

When asked if they noticed any differences between school and home when they entered elementary school, the interviewees recalled that the language used at school was Mandarin, while they spoke mainly Taiyu at home. *Jen* was the only exception to this, and remembered using Mandarin at home as well. When asked how they learned Mandarin, they all said they learned it naturally after going to school. This state of “naturalness,” however, was both similar to and different from that of the previous groups, due to the environment this younger group were situated in.

With regard to the similarities, both parents and participants knew that Mandarin was the path to education and a better future, and this was a powerful incentive for learning it. One interviewee, *Benny*, talked about the role of Mandarin in his life, and what follows is typical of how the interviewees felt about this:

Taiyu is our home language. We used it to communicate after we were born. And it is something natural, something we have affections for. Mandarin was learned later as a tool, a tool of communication with people in society, a tool of education to lead to a better career and better future. (*Benny*, male, physician, 51, focus group #2)

Significantly, *Ali* noted that failure to learn Mandarin was associated with lack of success in school, and a consequent lack of career opportunities:



I remember those who were often punished for speaking Taiyu. There were always those few. They couldn't speak Mandarin well, nor were they interested in school work. They did poorly academically. Taiyu seemed to just readily slip from their mouth, and thus they were those that were often punished. My teacher punished a lot. (*Ali*, female, securities broker, 45, focus group #4)

As will be discussed in more detail later, *Ali*'s comment that linked speaking good Mandarin to academic success, and the common belief of this group that Mandarin and Waishengness meant superiority, both testify to the deep exposure of this professional class to hegemonic values in their process of growing up.

The prevailing view of the importance of learning good Mandarin not only reveals the advantages linked with doing so, but it also implies the second class status linked with Taiyu. Together with the economic and class distinction young people felt between themselves and their Waisheng classmates, Mandarin and Waishengness, in their young minds, meant superiority, something worth pursuing. This contributed to the sense of "being inferior" into their constructions of identity, and thus affected the opportunities they had, as well as those which they felt they could take advantage of. Due to their lack of life experience, the children internalized the hegemonic high value of Mandarin as superior, and thus normalized the monolingual policy and its punishments.

The experience of learning Mandarin was very different for this group than for the earlier ones in several respects. First of all, although they were born in Taiyu speaking families, and spoke mainly Taiyu at home, they started learning Mandarin at an early age. Accordingly, it was no longer as foreign a language to them as it was for the Japanese or

early-KMT groups, but was something that was as much a part of their lives as Taiyu. As mentioned above, some interviewees spoke either a lot or a little Mandarin at home with their siblings and parents, since the monolingual policy had been in effect for decades by the time they had school. This, coupled with the restrictions on the use of Taiyu in the media, created a more natural environment for the acquisition of Mandarin. In addition, the implementation of the Culture Renaissance Movement reinforced the link that these children felt with Chinese culture, and consequently added to the “naturalness” of speaking Mandarin. Thus, in a sense, this group did automatically pick up Mandarin, different from the experiences of the previous groups.

In addition, as the Mandarin-only policy had been in place for several decades, there was no longer a lack of qualified teachers. In response to the researcher’s questions about their Mandarin learning experiences, their teachers and the difficulties they encountered, none of the interviewees recalled having difficulties, except *Penny* and *Finn*, although these reported only minor problems. For example, *Penny* complained that the heavy accents and use of dialects of her Waisheng teachers made it more difficult for her to learn Mandarin:

About half of the teachers were Waisheng Ren who stepped down from military positions and became teachers. They spoke Mandarin with a heavy accent that mixed Mandarin with the regional dialects they spoke. It was hard for a young student to understand. It sure was difficult for us to learn Mandarin from them. (*Penny*, female, businessman, 48, focus group #6)

*Finn* also complained about her Taiwanese Mandarin teachers would sometimes speak Taiyu in class, and she blamed that for what she referred to as her “Taiwanese Mandarin.” When

asked to explain what she meant by this, she defined it as “not standardized Mandarin, mixing Taiyu’s syntax and pronunciation with Mandarin’s, being unable to produce retroflex sounds in Mandarin because of the lack of them in Taiyu” (*Finn*, female, teacher, 53, focus group #11). Thus although she did not really see this as resulting in any serious difficulties, she did imply that her Taiwanese Mandarin was an inferior form of the language. Here *Finn*’s statement is consistent with the gender pattern emerging in the Early and Mid-KMT groups, in which women seemed to have a stronger desire to speak standard Mandarin, which they may have linked to their self-esteem and identity, and which may reflect gender differences with regard to adopting hegemonic values.

Part of what made this group feel that learning Mandarin “naturally happened,” without any pressure, was the way in which their teachers implemented the Mandarin-only policy. They recalled that teachers who were themselves Taiwanese were not strict in enforcing the policy. When asked to talk about their experience of being punished for speaking Taiyu, two of them, *Penny* and *Mont*, said that in the countryside the policy was not strictly carried out, although they knew there was such a policy and were aware of the rules. *Mont* did remember people being punished, “but not in my class” (*Mont*, male, university teacher, 47, focus group #6). Meanwhile *Penny* recalled that in her rural school, “The rules were not strict. There was the policy, but teachers did not strictly enforce it” (*Penny*, female, businessman, 48, focus group #6). For *Jim*, whatever punishments there were did not seem severe:

Our teachers were local Taiwanese, and they were not strict in implementing such a policy. Mandarin education had been promoted for a long time by then. There probably

was still the policy when I was in elementary school, but even if there was, it was not strictly enforced. It was not like that you would be punished for every Taiyu sentence you said. We were punished more for our grades than for speaking Taiyu. (*Jim*, male, self-employed, 46, focus group #8)

Five others also reported experiences with punishments, but had different perspectives on them. *Ali*, for example, felt the punishments were severe and took being punished seriously:

I remembered being punished for speaking Taiyu, which was seen as a big deal. The penalty was a fine of fifty cents or a dollar, seen as a large amount of money back then, or a dunce board hung around the neck. (*Ali*, female, securities broker, 45, focus group #4)

Others, like *Jen* and *Jo*, also remembered the use of punishments, but they did not comment on how they themselves felt about it. As *Jen* said, it was usually the same people who were being punished:

I remember quite a few students being punished. Now when I thought back, I can remember several boys who were often punished. I thought they were rebellious just to show they were different. They did not seem to take being punished seriously. (*Jen*, female, teacher, 47, focus group #2)

*Jo* noted that the punishments they got included fines and wearing a dunce board. *Finn* experienced similar punishments, but did not feel that they were severe:

...doing the cleaning after school [was used] as a punishment. I had a dunce board hung on me...However, we did not feel very pressured in the rural school. We used Taiyu from time to time, and our teachers were Taiwanese and were not strict. (*Finn*, female, teacher, 53, focus group #11)

*Benny* echoed *Finn*'s "not-a-big-deal" perspective in a different focus group interview, saying, "Some students got punished. But we just felt it was fun, as we did not take the punishment seriously" (*Benny*, male, physician, 51, focus group #2).

Given the dominance of Mandarin in both mass media and official discourse, as well as the state policy and prevailing climate of fear under the White Terror, it is not surprising that punishments were often used to make the students pay attention and work harder. What is noteworthy is the students' attitudes toward such punishments. Some saw it as a big deal, while others did not, but their accounts basically revealed no one took the punishments personally, whether they saw them as severe or not. *Benny's* and *Finn's* comments are typical of this perspective. As *Finn* said, they were punished when caught using Taiyu, but "We did not have special feelings for the punishments. We did not feel they were serious things" (*Finn*, female, teacher, 53, focus group #11). They did not take punishment seriously because, just as the adoption of Mandarin was normalized and had become unproblematic, so the punishments used to implement the monolingual policy were justified. Punishments were carried out as a natural result of "committing a mistake," and participants felt they were punished because they did something wrong. As *Ali* said, "They made you feel that speaking Taiyu was a wrong thing. You made a mistake and you were punished" (*Ali*, female, securities broker, 45, focus group #4).

The participants' experiences with punishments reveal two things here. First, the urban/ rural difference noted by *Penny*, *Mont*, and *Finn* was consistent with the difference found in the Mid-KMT cohort that where punishments were adopted, they were stricter in urban and suburban schools than in rural ones. Second, but unlike the previous cohort, generally severe punishments were not adopted to make them learn Mandarin, and, as will be shown in the conclusion, this reflects the need of Mandarin hegemony to be constantly recreated to maintain its dominance.

Indeed, the interviewees felt that in the context of the time, they did not feel there was a deliberate policy "to try to impose a language as well as a national identity on us," as *Jim* said. He noted, "We took in everything we were taught without thinking much" (*Jim*, male, self-employed, 46, focus group #8). *Jo* also made the same observation, and further stated, "It was [only] after martial law was lifted and I looked back that I felt the policy" (*Jo*, male, teacher, 54, focus group #11).

### **Punishments from teachers' perspective.**

Students were not the only ones who felt that the implementation of the monolingual policy was now unproblematic, as teachers who taught during the era had similar views. Several recalled how they taught Mandarin after they became teachers. Their general responses to questions related to this issue were that the policy was still in place, but they did not have to make much effort to enforce it by punishing students, as most children could speak Mandarin by then. As was revealed by *Finn*, who started teaching in 1978:

When I began teaching in 1978, I almost did not feel the policy being implemented.

There was no need to promote it by punishments. Mandarin had become a part of our

life. Taiyu was seldom used, whether in school or at home. I used it with my own children at home purposely to perfect their Mandarin. (*Finn*, female, teacher, 53, focus group #11)

*Jo*, who became a teacher one year earlier, also noted in the same focus group interview:

I also did not feel Mandarin was being promoted when I began teaching. I taught in a remote rural area, where we used both Mandarin and Taiyu. But I did not think we were still implementing the Mandarin-only policy then. (*Jo*, male, teacher, 54, focus group #11)

*Finn* added,

We used almost all-Mandarin then. I felt that students had to learn Mandarin well as a prerequisite for good grades and a better future. So I would make every effort to avoid using Taiyu in class and at home with my children. (*Finn*, female, teacher, 53, focus group #11)

*Finn*'s response reflects the general attitude of teachers in this era, which was also a result of the normalization of the language policy and the construction of the KMT hegemony. This perspective was also shared by the interviewees who began their teaching careers earlier, in the 1960s or even in the 1950s. *Manny*, who was born in 1940 and became a teacher in the 1960s, just like *Mishi* and *Yochi* before her, stated that there was a clear necessity to promote Mandarin:

The Mandarin-only policy was enforced because it was necessary. The Mainland Chinese needed a unified language in order to govern Taiwan after the Japanese

rule... Whether we were students or teachers, we were educated to believe that we should learn and speak Mandarin. Students needed it for the exams, so we should execute the policy seriously... Learning or teaching Mandarin was more than natural. She further justified her support for the policy by referring to the students' practical needs: Besides, if we did not teach students Mandarin, how could they pass exams, big or small, which their future was dependent upon? We did it for the students' good. (*Manny*, female, teacher, 70, focus group #12)

Overall, the teachers' attitudes reveal that, on the one hand, Mandarin learning had become increasingly natural, and so it required few punishments in order to promote it. On the other, their responses also suggest that Mandarin, and the values linked with speaking Mandarin, including a Chinese identity, were more readily accepted as norms for the younger generation.

### **Conclusion—Construction of Hegemony**

Like the previous groups, the participants in the peak-KMT group felt that they naturally learned Mandarin. However, while for the former the artificialness of the situation was reflected in the practical difficulties both teachers and students encountered, the latter group was perhaps the only one that did naturally pick up Mandarin. They lived surrounded by Mandarin from a very young age, as it had already become the dominant language. They heard Mandarin in the street and on TV; they used Mandarin at school, and also at home. For the first decades of the Mandarin-only policy, home and school had been two separate spaces—children used Mandarin at school but Taiyu at home. In the period discussed in this chapter though, from 1966 to 1987, this situation had gradually changed,



with significant implications on the idea of a Taiwanese identity, as will be discussed in Chapter 9. The story of the children in this era can be summed by *Lily*'s comment, when she said, "I regarded myself as Chinese at that time" (*Lily*, female, teacher, 57, focus group #4). Moreover, they were Chinese who pursued not only Mandarin, but good Mandarin, as revealed in *Ali*'s account at the beginning of this chapter.

The peak-KMT group lived surrounded by messages that praised Mandarin and Chinese culture as of high value, while they rejected Taiyu and Taiwanese culture as inferior. Despite the ease and naturalness of picking up Mandarin, which was helped somewhat by these messages, this group were still aware that punishments existed if they spoke Taiyu at the wrong time or place. It should be remembered that hegemony needs to be constantly recreated to keep it a lived reality in people's lives, just as Billig argues that nationhood is alive only when people remember it all the time. Therefore, if the punishments were not often carried out, the knowledge that they existed helped maintain the dominance of Mandarin. Note that by the end of the previous era (1959) the KMT's hegemony had been fully established, but to be sustained the process of constructing it could never really end.

### **Good Mandarin vs. Bad Mandarin**

In view of the mechanisms of the entire Mandarinization and Sinification project, recreating hegemony at this point meant maintaining the dominance of Mandarin and Waishengness. Accounts from the Peak-KMT group revealed that, since "everyone" now spoke Mandarin, people now had a new goal to aspire to—the perfection of their Mandarin. Simply speaking the language was not enough, they needed to speak good Mandarin, just like their Waisheng classmates. As discussed in the previous chapter, the participants'

feelings toward their Waisheng classmates were no longer necessarily ones of resentment, but instead were often based on admiration of their higher social and economic status. During this era, the original cultural and linguistic distinctions between the two ethnic groups developed into economic and class ones, and thus things related to Waisheng Ren gradually became aspirational goals.

The shift in emphasis from speaking Mandarin to speaking good Mandarin actually developed in line with the change of Bensheng/ Waisheng distinction, and it enhanced the superior status of Waishengness, as “good Mandarin” was the Beijing Mandarin/ Waisheng Mandarin. Participants’ acute awareness of the superiority of the Waisheng Ren, including their Mandarin, as compared to the inferiority of most Bensheng Ren, helped maintain the dominance of the former. *Benny* remembered that their Waisheng classmates spoke good Mandarin and were their role models. *Ali* related the ability to speak good Mandarin to academic success and better opportunities. Academics also advocated speaking standardized Mandarin, also known as Beijing Radio Mandarin. Moreover, TV sent out the message that well-educated and successful people spoke standardized Mandarin, and thus Bensheng/Waisheng became a clear class distinction.

This class distinction was reproduced in the distinction between northern and southern Taiwan, as has been seen in the case of *Wes* in Chapter 6. Due to the fact that most of the Waisheng Ren settled in northern Taiwan, especially in the capital, Taipei, the Mandarin spoken in this area was regarded as “more standardized” than that spoken in the south, thus producing the idea that “good Mandarin” was “Taipei Mandarin”, while “bad Mandarin” was

“southern Taiwan Mandarin.”<sup>6</sup> However, given that “good Taipei Mandarin” was “bad” by the standard of Beijing Mandarin, the distinction between “good” and “bad” was in fact not an issue of quality but was one of class, which was created and decided by issues of power.

The construction of hegemony became easier when class distinctions inspired people to avoid marginalization and seek empowerment. Especially for this Peak-KMT group, the professional careers that they eventually pursued are a testament to their ambition and hard work, and thus it is perhaps not surprising that they were willing to move toward the dominant social values, and away from their own Taiwanese-ness and home languages. Throughout the course of their early lives they were more thoroughly exposed to the effects of hegemony than the participants in the earlier groups, and once this became their lived reality it fundamentally changed their sense of Taiwanese-ness.

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<sup>6</sup> There are two notable differences between Beijing Radio Mandarin and Spoken Taiwanese Mandarin. First, in the former, the retroflex initials and their non-retroflex equivalents are distinguishably pronounced, while in the latter, the retroflex sounds are not pronounced so obviously different from the non-retroflex ones, due to the influence of Taiwanese vernaculars. Second, Beijing Radio Mandarin, as a stress-timed language, uses a lot of “qingsheng [neutral tone],” which does not occur as often in Taiwanese Mandarin. As a result, while Beijing Radio Mandarin is clearly pronounced, Taiwanese Mandarin sounds a little slurred and quick.

## **Chapter 8    Becoming Taiwanese**

This chapter discusses how the people who participated in my study and grew up under Japanese rule and in different stages of KMT rule negotiated the meanings of “language,” “difference,” “dominance,” and “hegemony”, and how these things link to Taiwanese identity. I examine each group in turn, paying close attention to how their individual experiences and life-course factors shaped their understanding of these. I argue several things. First, except for those who grew up in the earliest group, i.e., under Japanese rule, for most participants a distinct Taiwanese identity only developed after the lifting of martial law in 1987. Second, with the establishment of KMT hegemony, the participants’ connections to their home language grew weaker, as did their assertion of Taiwanese identity via Taiyu. Third, the experiences of the cohort of retired teacher participants show that class and occupation played a role in shaping their Taiwanese identity and their view of home languages, defined by their relationship with the hegemonic forces.

### **Those Going to School under Japanese Rule and Early-KMT Rule**

#### **(Japanese and Early-KMT Group)**

I discuss the Japanese group and early-KMT group together here, because the experiences of these participants regarding identity formation and their views of language overlap. Besides, all those who experienced Japanese rule also experienced the early KMT years.

The participants’ life-course experience of struggling with a Japanese identity, due to their years living under Japanese rule coupled with the sense of Chinese identity that came from their Han heritage and their experiences of encountering Mainland Chinese, left space

for their Taiwanese identity to grow. In addition, growing up when the Mandarin policy was not as yet in place, they had stronger connections to Taiyu. All of these factors led to their comparatively weaker Chinese identity as compared to the mid- and the peak- KMT groups, and their stronger assertion of Taiwanese identity via Taiyu.

On the identity front, many things played a role, Japanese superiority, Chinese origin, and the relationship with home languages and culture, all of which constructed the context against which the identities of these participants were shaped. However, while a Taiwanese identity could be collective, people had their own individual takes on it. As the Japanese cohort reveals, their identity work was complicated.

### **Negotiation of Identity: Imaginary Chinese Links; Discouraged Japanese Identification**

Identity issues under Japanese rule were torn between the desire to become authentically Japanese and the impossibility of achieving this. As one of the interviewees, *Mishi*, said, people struggled to become “National Language” or even “Kōminka Families”, but in the eyes of their Japanese rulers, they were still regarded as Taiwanese, or at most Taiwanese Japanese (Lin, 1992/2011; Cai, 2000). Four of the seven participants did not mention their Japanese identity, but instead asserted their Taiwanese ones. In the eyes of the colonial rulers, Chineseness ran in the blood of the dominated Taiwanese, and this meant that they could never really become Japanese (Meisner, 1963). Consequently, Taiwanese people were not recruited as soldiers to fight in the Sino-Japan War until the very late stages, as their loyalty to the Emperor was questioned (Lu, 1997; W. Zhou, 1997).

As a colonizer, the Japanese government did not in fact lose the hearts of the Taiwanese people, as testified in interviewees’ recollections in Chapter 4. The Japanese

ruled the island with iron laws and strict social stratification, but they made people feel they lived in a disciplined and secure society. All of the participants' memories of Japanese rule were more about missing the "good old days" rather than complaining about being brutally oppressed and strictly confined. They said they were exploited, but they were also appreciative of the secure and advanced society the Japanese established in Taiwan. As *Shinn* recalled, "The Japanese police were harsh, but they had made Taiwan pretty advanced, with a lot of development before the KMT came" (*Shinn*, male, business owner, 74, focus group #3).

What do these mixed feelings about Japanese rule mean in the formation of Taiwanese identity? They actually played an important role from within and without, and their influence on identity construction even extended to the period of KMT rule. These feelings not only concerned how people wanted to develop a Japanese or Taiwanese identity themselves during this era, but also what kind of identity the KMT regime later wanted them to adopt. Simply put, their attitudes toward Japanese rule affected how they saw the Chinese and how the Chinese saw them, and this had a key part to play in how the Chinese rulers that followed the Japanese treated them. Thus, what was involved in the formation of Taiwanese identity was not only how they viewed the Japanese, but also how this affected their view of the later KMT regime, as well as themselves.

This work of identity negotiation was complex in several ways. First of all, the adoption of Japanese culture, values, and language, as the Japanese government required, did not ensure the Taiwanese a smooth transition to a Japanese identity. As Ching (2001) contends, the aim of the *Kōminka* Movement, which called for assimilation through Japanese

language and names, was to “transform its colonized peoples into loyal imperial subjects in preparation for the war” (p. 92). As discussed above, the Taiwanese were not recruited for the Sino-Japan War, as the Japanese had concerns over their Chineseness, and thus their loyalty to the Emperor. Not until 1942 was volunteer recruitment practiced as one of the four major projects of Kōminka project, and Taiwanese people were then recruited to fight for Japan. Before this they may have worked to help the war effort, but indirectly, through work as labourers. It should also be noted that these “loyal imperial subjects” were not treated as “authentic Japanese.” In fact, ever since the beginning of colonial rule, how colonized subjects should be treated had aroused debates in Japan, and government attitudes had changed from seeing them as “biologically un-assimilatable” to including them as an “extension of the mainland,” to treating them as “potential imperial subjects.” But from the start the policy had always been discriminatory in nature. Just as Hsu (2006) argues, in the eyes of Japan, Taiwan was always seen as “its other.”

As one of the interviewees, *Mishi*, mentioned in Chapter 4, the adoption of a Japanese name or even studying in Japan did not ensure being treated equally:

It was much more difficult to acquire a Japanese nationality than go study in Japan. They wanted us to adopt Japanese names, but they did not give us Japanese nationality. We were still Taiwanese. Even though I wanted to be Japanese or feel myself Japanese, they did not let us become Japanese. (*Mishi*, male, teacher, 80, focus group #12)

Therefore, while some people may have wanted to become Japanese, it was not possible, and one exchange between *Yochi* and *Wong* reveals this situation. When *Wong*

said, “At that time some of our teachers studied abroad in Japan and came back to Taiwan to teach,” *Yochi*’s reaction was that “Not ‘studied abroad’—Taiwan and Japan were a country, but Japan had a higher cultural level so Taiwanese people went there to study” (*Yochi*, male, teacher, 75, focus group #1). They both thought that Taiwan was Japanese, but *Wong* also mentioned that despite people’s longing to become Japanese, the Japanese rulers would not let them (*Wong*, merchant, 73, focus group #1).

Cai (2000) confirms that such an aspiration was held by many people by arguing that the dominated Taiwanese did not complain about the elements of Japanese culture that were imposed on them, nor of the colonial government’s intention to eradicate their sense of being Taiwanese or Chinese. What upset them was that their efforts to adopt Japanese culture were not rewarded. In other words, they did not mind having a Japanese identity imposed upon them, but they wanted to be treated as real citizens of Japan. However, for the rulers, this was almost impossible. On the one hand, the Japanese wanted to convert the colonized people into loyal subjects, but on the other they so despised the dominated people’s Chineseness that it prevented them from treating them as authentically Japanese. *Mishi*, whose father was a merchant in Shanghai before World War Two, when the city was under Japanese control, mentioned the typical Japanese view of Chineseness:

During the Japanese rule, my father was living and working in Shanghai. Chinese people were not allowed to enter Shanghai, and that was why the Japanese could maintain good social order there. The Japanese people hated Chinese people. There were signs hanging at the Shanghai park entrance that read “No Chinese or dogs”. (*Mishi*, male, teacher, 80, focus group #12)



As argued in Brown (2004), although government policy required people in Taiwan to think of themselves as loyal subjects of the Japanese empire, they “experienced clear categorical differences between themselves and Japanese which left them with a sense of non-Japanese identity” (p. 9). What lay between the expectations of the colonized and the actual treatment from the colonizer was the “overwhelming existential anxiety and political desire” (Ching, 2001, p. 91) of the colonized. This led Ching (2001) to argue that under Kōminka, “‘identity struggle’ emerged as a fundamental problem” (p. 91), which arose from the gap between officially stipulated cultural assimilation and real-life political discrimination. According to Ching (2001), discriminatory assimilation was necessary on the part of the colonizer, as it resolved the contradiction of Japanese assimilation with regard to an assumed “natural nation-people link” which they expected of the colonized, and the questionable assumption that this could be developed in the colonized people. With this mechanism, “being Japanese became the sole responsibility of the colonized” (p. 97). However, this assimilation was as problematic for the colonizers as for the colonized, as Ching argues. For the former, “Japanization” was “a failed, yet to be realized, colonial ideal,” while for the latter, it posed a fundamental identification problem, just as the interviewees experienced with regard to being a “not-authentic Japanese,” or, in Ching’s terms, “an incomplete imperial subject” (2001, p. 91).

### **Asserting Taiwanese identity.**

Between a discouraged Japanese identity and an imaginary Chinese one, was there a space for a Taiwanese identity? In fact, this seemed to be the only tangible identity that people could assert for themselves in this era. Discriminatory treatment of the Taiwanese by the Japanese regime denied the former an authentic Japanese identity, and this allowed

people to instead cultivate their connections with China and / or develop a Taiwanese identity. The Japanization program which tried to cut the people's link to a Chinese identity and to connect them to a Japanese one thus fostered a totally different identity. The anti-Japanese revolts that occurred during the early stages of colonial rule were assertions of a particular sense of groupness. But as Ching (2001) argues, at this time "any notion of a Taiwanese identity is always already subsumed under the wider identification of an all-inclusive Han Chinese ethno-national consciousness" (p. 63). This sense of groupness was at first sight a Taiwanese identity manifested by a deep-seated Chineseness, but it was also more than that. The assertion of a Taiwanese identity, according to Ching, actually involved a lot of mediation and adaptation in the process of experiencing Japanese colonial rule, a sense of disillusion with their Han consciousness, and the consolidation of a Taiwanese identity. Ching thus does not take the nature of this Taiwanese identity as exclusively and particularly Taiwanese, as historian Shih-Min does (as cited in Ching, 2001), but insists that it is embedded in both an all-inclusive Han consciousness and Japanese colonialism (2001, pp. 72-75). Ching especially argues that Japanese colonial rule played a decisive role in this process, as it was the development under Japanese rule that triggered the differentiation in the minds of the Taiwanese between themselves and those from China. Such a differentiation later consolidated and strengthened the bond among Taiwanese people, as they moved from one that originated from a common fate and psychology, to one that was based more on their reality of their daily lives (Ching, 2001). It is in this sense that the Taiwanese people's first encounter with people from China and their subsequent disillusion with their Han consciousness played a key role in the making of a Taiwanese identity.

One thing worth noting about these participants' sense of Taiwanese-ness is that during Japanese rule the banning of home languages and Taiwanese traditions and customs was not accompanied by any efforts to denigrate them, unlike the KMT's Mandarin-only policy. According to the participants, they were made to learn Japanese, but they did not feel that their home languages and culture were inferior or backward, very different to what happened under the KMT. S. Huang (1993) also claims that in spite of the high proportion of Taiwanese who knew how to speak Japanese, it was mainly used in schools, and people tended to use home languages at home as well as in public. It may be argued that within the 50 years of Japanese rule the strict enforcement of Japanese language and culture occurred only during the last decade (1937-1945), and that compared to the official enforcement of the Mandarin-only policy, which lasted for over 40 years, this was not long enough to see any significant negative effects on home languages and culture. However, even if this were true, the reality was that Taiyu and Taiwanese culture was neither forbidden nor stigmatized, and so, people were able to maintain their links to them, which helped greatly as they negotiated their identities.

That said, even if people could preserve their links to Taiyu and Taiwanese culture, their Taiwanese identity had in many ways undergone a transformation. As Ching (2001) argues above, it contained a hybrid of Chineseness and Japaneseness. The aggressively implanted Japanese values had not only changed the content of Taiwanese identity, but also people's perspectives toward how they viewed the world and themselves. The process of figuring out "who am I?" was a tussle between these competing forces for people growing in this era. Their subjugation to Japanese colonial and then Chinese quasi-colonial rule definitely added something unique to their sense of Taiwanese-ness, distinct from that of

people growing up only under KMT rule. Points of identification happened when they wished to become Japanese but were not treated as real Japanese, and when the link to the fatherland prompted them to become Chinese, but they soon found that authentic Chineseness was disappointing. Such points also occurred when these people were made to become Chinese under the KMT, but their residual Japaneseness and Taiwaneseess led them to be treated again as non-authentic subjects. The feelings that arose because of such experiences left marks on their identities.

### **Between becoming Japanese, becoming Chinese and becoming Taiwanese.**

In between their becoming Japanese, Chinese, and Taiwanese, the interviewees also imagined various different boundaries of national community. Before the Mainlanders came, there was an imaginary thread tying the Taiwanese people to those in China. As discussed earlier, this was not based on actual contact, but was on theoretical commonality, part of what G. Wang (2003) calls “historical identity.” The sense of being Chinese while being colonized by the Japanese led to an imaginary nostalgia for people and things Chinese, although these were rarely encountered in Taiwan. Still, this theoretical Chineseness running in the blood of the Taiwanese facilitated the imagining of a shared national community. The defeat of Japan in 1945 led to another turning point in the construction of their identities. Suddenly their nostalgia for China had a chance to be satisfied. The use of the term “Zuguo” for China, or “the fatherland” clearly implied an imagined national community which was composed of people on both sides of the strait.

However, after the Chinese soldiers came, and especially after the 228 Incident, the boundaries of the imagined community were remapped due to disillusionment with the

fatherland, their memories of the Japanese era, and their anger at being oppressed again under the KMT, all of which played key roles in shaping their life-course identities. These feelings divided people living on the island into two groups, Bensheng Ren and Waisheng Ren, and the former drew a line between themselves and the Mainlanders. The word “sheng [province]” thus became part of the imagined national community, which changed from “Zuguo” to “Bensheng,” with Bensheng Ren as “we” while Waisheng Ren was “they” and “the others.” The commonly used, taken-for-granted categories of Bensheng and Waisheng were in fact not just neutral labels. They carried Taiwanese people’s hatred for the newcomers. In addition, as mentioned earlier, although the boundary between the two groups was an imaginary rather than physical one, it was almost untranscendable.

The experiences of the Japanese group thus distinguished the development of their life-course identities from that of the other groups, and may account for why these participants consistently displayed a pattern of rejecting Chinese nationalism, and did not regard themselves as Chinese during the Mandarin-only period. Despite their stronger perception of their Chinese roots compared to other participants, this did not make them want to become Chinese, due to their strong dislike for the KMT regime. As a result, they were able to maintain strong links with their home languages, and take pride in both Taiyu and Taiwanese culture, even under the imposition of Chinese nationalism.

### **Meaning of Taiyu and Mandarin**

The Japanese group and the early-KMT group are also distinctive in their view of the meaning of home languages and Mandarin in their lives. After the 228 Incident, with the politicization of the categories “Bensheng” and “Waisheng” along came the politicization of

languages. Mandarin was referred to by people as “Waisheng hua” (language of the Waisheng Ren). For the participants’ parents or grandparents, Taiyu was just the language they were born with, and naturally picked up from the environment. The Japanese government did not forcefully impose their language on these people. They may have seen Taiyu as a key part of their Taiwanese identity, but they did not emphasize the association between the two. However, the Japanese group were different from their parents and grandparents.

*Mishi*, who expressed strong dislike for Chinese people, talked about his definition of “Taiwanese people” and his Waisheng son-in-law:

Taiwanese people have to be able to speak Taiyu. Otherwise, they are not Taiwanese...My son-in-law is unable to speak Taiyu after living in Taiwan for decades. He speaks only Mandarin. He is Waisheng Ren, not Taiwanese. (*Mishi*, male, teacher, 80, focus group #12)

As is shown in *Mishi*’s account, when asked how they defined Taiwanese-ness at the moment they were interviewed, the Japanese group generally saw Taiyu as an indispensable element, and that speaking Mandarin was part of a Chinese identity. *Shinn*, for example, said, “In my opinion, being Taiwanese you have to be able to speak Taiyu. This is the bottom line” (*Shinn*, male, business owner, 74, focus group #3). *Yochi* also defined “Taiwanese people” as “living in Taiwan and speaking Taiyu” (*Yochi*, male, teacher, 75, focus group #1).

The significance of Taiyu to these participants was clear in their accounts. They twice experienced having foreign languages imposed, Japanese and Mandarin, and, in the case of the latter, were forced to adopt the language of a people they despised, and these

deeply influenced the role of home languages in the development of their life-course identities.

For all these reasons, the participants in this group saw home languages differently to the way their parents did. Specifically, they saw languages as having nationalist implications, equating speaking Taiyu with identifying with Taiwan, while not being able to speak it as identifying with China. The only exception to this was when they denied any link between their speaking Mandarin and their sense of a Chinese identity during the monolingual policy period. This, however, is not an inconsistency in their positions, but rather shows that they so despised Chinese things and people that they still denied any links with them. They thus learned Chinese for pragmatic reasons, but they never regarded themselves as having a Chinese identity.

It is thus not surprising that this group thought it important to preserve the various home languages. However, when it came to using Taiyu at home, *Mishi* said:

None of my grandchildren can speak Taiyu. This is a trend which we just have to accept. I emphasize Taiwanese consciousness, and I ask them to speak Taiyu at home. But they can only speak Mandarin, and I cannot force them to learn Taiyu. (*Mishi*, male, teacher, 80, focus group #12)

*Mishi*'s account is typical of the Japanese group. *Manny*, *Yochi*, and *Wong* made similar comments. "My grandchildren cannot speak Taiyu, either. My daughters (their mother) just did not teach them Taiyu. There is nothing I can do" (*Manny*, female, teacher, 70, focus group #12). "I use home language [Taiyu] with my wife, but with my grandsons,

I have to use Mandarin” (*Yochi*, male, teacher, 75, focus group #1). *Wong* added, “It’s a trend which we cannot resist” (*Wong*, male, merchant, 73, focus group #1).

As seen in their testimonies, the participants actually did not apply their belief that Taiwanese people should be able to speak Taiyu to their grandchildren. This shows that their own national or cultural identification are not the only factors that influence their views of languages, as other concerns, such as accommodation of younger family members’ development of a personal identity, also play a role. Indeed, such an accommodation across generations is confirmed in Sandel (2003) and Sandel and Chao (2006), who associate it with a shift from home languages to Mandarin in both families and the wider society in Taiwan in recent decades.

In brief, in terms of life course identity, the Japanese group shows the most complex patterns among all the research participants. They had the strongest perception of their Chinese heritage, but resisted becoming Chinese. They had the strongest connections to Taiyu and the strongest assertion of a Taiwanese identity, as defined by their use of Taiyu, but in reality this identity was a hybrid that was embedded in their Japaneseness and Han consciousness.

### **Those Going to School When KMT Hegemony Was Being Established (Mid-KMT Group)**

For those growing up in the era when the KMT hegemony was being established and Chinese nationalism and Mandarin aggressively imposed on the Taiwanese people, becoming Chinese had several meanings. First, the Bensheng-Waisheng boundary was not perceived as a national one, but instead as an economic and cultural distinction. Second,



their connection with Taiyu was not as strong as that of the Japanese group, and they also only weakly linked Taiyu and Taiwanese identity. Third, there was little space for them to assert a Taiwanese identity, which emerged only after the lifting of martial law. However, not all of the participants responded to becoming Taiwanese in the same way—as some questioned the “authenticity” of their Taiwaneseess.

## **Making of Identity**

### **Boundary of an imagined community.**

Like their parents and the Japanese group, the interviewees in the mid-KMT group came to use Bensheng and Waisheng to distinguish Taiwanese people from those who had come from the Mainland. However, the process of being educated to become Chinese changed their idea of national community. There was still the differentiation of “we” and “they,” “us” and “other,” in these terms, but the contrast was accommodated under the unified imagined community of China. This was for several reasons. To begin with, the mid-KMT group did not have anything to compare their experience of the KMT’s occupation of the island to, as they did not have the experiences of the older groups with regard to confronting Chinese soldiers. Although there were still many reasons for them to dislike the KMT and Mainlanders, they were not as resistant to the KMT’s efforts to impose a Chinese identity on Taiwan. Also, due to the superior status of Waisheng Ren, they saw Waishengness and Mandarin as attractive, which contributed to their adoption of a Chinese identity. Besides, being instilled with the nationalistic project of retaking the Mainland and saving their fellow Chinese people from the Communist Party, they regarded themselves as Chinese and their imagined community was China, which included both the Mainland and

Taiwan. With such a mindset, the terms *Bensheng* and *Waisheng* came to represent social divisions under a supposedly unified imagined national community.

### **Becoming Chinese.**

During this era, the interviewees experienced Chinese nationalism being forcibly imposed on them, not only through the school curriculum, but also through the media. The fact that they went on to lead middle-class lives, as discussed earlier, implies that they were more intensely exposed to the hegemonic forces at play during this time, and worked harder to learn Mandarin in order to get ahead in life. They thus mostly recalled that they regarded themselves as Chinese at this time, with *Mona* and *Wes* the only exceptions to this. *Mona* said, “I don’t think that I was aware of their intention of making us become Chinese. I didn’t think I was Chinese” (*Mona*, female, teacher, 65, focus group #10). *Wes* further asserted, “It never occurred to me that I was Chinese. I always regarded myself as Taiwanese.”

When asked if he used the term “Taiwanese” then, he said:

No, we used “*Bensheng Ren*” and “*Waisheng Ren*,” but for me, the former kind of meant “Taiwanese people”...I did not feel myself Chinese because, first, I spoke *Taiyu*, and second, the discriminatory treatments that *Bensheng Ren* suffered made me aware of my identity. I had had the feeling that they were superiors since I was little. (*Wes*, male, teacher, 65, focus group #10)

Of course, it is possible that *Mona* and *Wes*’ views were an expression of their current identities, something that they were reading back into their childhoods, since they revealed a stronger Taiwanese consciousness than the rest of the group in their interviews. However,

*Mona*'s resistance to becoming Chinese may also have resulted from her father's strong dislike for Waisheng Ren, as mentioned in Chapter 6.

Hegemonic forces, however, worked on most participants, as they identified themselves as Chinese. First, they were educated to become Chinese, but they were also surrounded by the message that they were second-rate Chinese, and that their Taiwanese-ness was coarse. Looking back, although they felt they were Chinese then, they knew that they were not genuine Chinese in the eyes of Waisheng Ren. Their Chinese-ness was inauthentic, and so was the Mandarin they spoke, with both points seen as humiliating. Therefore, underneath their becoming Chinese were a range of disturbing emotions, such as doubt, uncertainty and self-negation.

Under the KMT's stricter regime, no space was left for the assertion of a Taiwanese identity. It was not until society became more democratic, with the lifting of martial law in 1987, that formerly excluded narratives became more widely known, and discussions of Taiwanese topics became acceptable. However, while many embraced the chance to resume their Taiwanese-ness, not all of the participants did so. Two female teachers, *Yue* and *Shine*, seemed hesitant in claiming they were Taiwanese. *Yue* said, "I would say that we are 'Chinese people in Taiwan.' I identify myself as an ROC national" (*Yue*, female, teacher, 65, focus group #9). *Shine* said, "In fact our nation is 'the Republic of China.' Theirs is 'the People's Republic of China.' We are not the same country" (*Shine*, female, teacher, 65, focus group #7).

Swinging from a Chinese identity to a Taiwanese one, their former status of being regarded as "not-authentic" and "second-class" also seemed to have changed. However,

this suggests that uncertainty has been an unchanging feature of their search for answer to the questions “who am I?” and “where do I belong?”, so much so that when they had a chance to become Taiwanese, as in the past two decades, there was no consensus on what identity to adopt, with some avoiding a fully Taiwanese one. What is more, they justified this by saying that they were not really “authentic” Taiwanese. In this respect, this group was very different from the Japanese one, who, although they had struggled with multiple identities, never doubted their Taiwanese-ness. *Yue*, for example, in asserting her ROC identity instead of a Taiwanese one, even stated that “We actually are not genuine Taiwanese people. The aborigines are. We have a dilemma about who we really are” (*Yue*, female, teacher, 65, focus group #9). *Beam* added, “We came to Taiwan earlier than the Mainlanders, probably 80 or 100 years earlier, but that still doesn’t mean we are Taiwanese. There are natives who are genuine Taiwanese people” (*Beam*, male, teacher, 66, focus group #9). Likewise, *Grace* said, “We are not ‘genuine Taiwanese’ either. Only the native aborigines who inhabited the island long before the Han settlers came are genuine Taiwanese” (*Grace*, female, teacher, 66, focus group #7).

Two things are noted from the above comments. First, *Yue*, *Beam*, and *Shine* were all teachers, and this may have been a factor in the formation of their life-course identities. Since they were exposed to hegemonic forces and values, and used to imposing them on their students, this might account for their hesitation about becoming Taiwanese. These accounts also reveal that even though people may experience the same “points of identification,” they can still form very different identities, which reveals that the dynamic nature of identity construction involves more than a shared history, and that class or occupation may have significant effects. Second, while the issue of “authenticity” is a legacy of colonialism that

haunts the identity development of the colonized people, as revealed in the Japanese group's feelings about not being treated as real Japanese, what is reflected in the comments of the mid-KMT group is the continuing sense of uncertainty and instability with regard to the question "who am I?"

### **Meaning of Language**

Based on the different contexts they grew up in, the interviewees from this era had different views of Mandarin and Taiyu than those of the Japanese group and early-KMT group. Typical of this was *Chen's* statement, "We spoke Taiyu before we went to school, and we never asked why we learned Mandarin after going to school. Children were simple. We learned whatever the teacher taught" (*Chen*, male, professional, 63, focus group #5). *Leaf* echoed this, adding, "We did have full respect for the teachers. Whatever they said was not questioned. Whatever they taught, we just learned it" (*Leaf*, female, homemaker, 60, focus group #5).

Mandarin was not the language they used at home, but acquiring it at an early age, right after they started school, meant that they were comfortable using it. As *Ji* recalled, "I started learning Mandarin after I entered elementary school... We were obedient to the teachers. Some learned it more diligently and better than others, but none was resistant to learning it" (*Ji*, male, technician, 67, focus group #3). *Shine* also said, "We started speaking Mandarin right after we started school... Our teachers wanted us to learn Mandarin, and we learned it" (*Shine*, female, teacher, 65, focus group #7). *Grace* and *Lily* had similar memories about learning Mandarin. "I never thought of asking why we learned Mandarin

or resisting learning it. I just learned it without any question,” said *Lily* (*Lily*, female, teacher, 57, focus group #4).

*Grace* had a different experience of learning Mandarin from her fellow interviewees, as she picked it up very easily. “I lived in a Mainlander community and our school was composed mostly of Mainlanders. Before I entered school, I could speak Mandarin, though not standard Mandarin. That was because my neighbours were all Mainlanders” (*Grace*, female, teacher, 66, focus group #7). She also emphasized her obedience to her teachers, “What the teachers said was like a “Shengzhi” (Royal Edict).”

Learning Mandarin thus happened automatically for this group, and they started doing so when they entered school, or even earlier. In their memories, they did not have any problems learning it, as recalled by *Shine*, *Beam*, and several others. *Shine* recalled, “I felt it natural to speak Taiyu at home and speak Mandarin at school, because the teachers wanted us not to speak Taiyu. I do not remember having difficulty learning Mandarin” (*Shine*, female, teacher, 65, focus group #7). *Beam* added, “I did not have problems learning Mandarin, except that my Mandarin had a Taiwanese accent” (*Beam*, male, teacher, 66, focus group #9).

Their experience of learning Mandarin automatically and smoothly was different from that of the Japanese group, who felt Mandarin was imposed on them. In contrast, the mid-KMT group were attracted to both Mandarin and Waishengness, and accepted the inferiority of their home languages and Taiwanese-ness. When *Beam* recalled the TV programs of this time, we can see how such representations could have shaped his opinions:

TV programs always represented Taiwanese people as vulgar, while those speaking Mandarin as the higher level of the society. But not just TV programs, the society made us feel that those better educated spoke good Mandarin. People from lower levels of society either did not speak Mandarin or they spoke Taiwanese Mandarin [Mandarin with a Taiwanese accent]. (*Beam*, male, teacher, 66, focus group #9)

*Yue* echoed him by saying, “I also kind of felt so” (*Yue*, female, teacher, 65, focus group #9)

This group saw the same distinction reproduced between northern and southern Taiwan. *Chen*, who was a banker, recalled that he used only Taiyu at work in the south, but when he went to the headquarters in Taipei for meetings, he spoke Mandarin, as this was the common language there. *Wes* worked hard to polish his Mandarin, because it was looked down on by his cousin in Taipei. “My cousin married a guy who lived in Taipei. She always said that we were coarse ‘Xiangang Ren [people living in southern Taiwan].’ She was assimilated by those living in Taipei and became a Taipei Ren” (*Wes*, male, teacher, 65, focus group #10). *Wes* described how he used his spare time working very hard to learn “standardized Mandarin,” and later received compliments from his cousin’s husband, who said, “My colleagues do not believe that you are from ‘Xiangang,’ because your Mandarin has no southern accent at all.”

Due to the fact that most of the Waisheng Ren settled in northern Taiwan, especially in the capital, Taipei, the Mandarin spoken in this area was regarded as “more standardized” and thus “better” than that spoken in the south. *Wes*’ recollections showed that he wanted to have not only Mandarin, but good Mandarin, while meanwhile concealing his Taiwanese-ness, as this represented inferiority.

While the participants in this group did not see Mandarin as imposed on them, but took it as a natural part of their lives, they said they attached different meanings to Mandarin and Taiyu. For example, “Taiyu is what we were born with, a natural thing. Mandarin is nothing but a tool of communication” (*Mona*, female, teacher, 65, focus group #10). “We had more affection with Taiyu than with Mandarin. Taiyu was our home language” (*Ji*, male, technician, 67, focus group #3). *Leaf* also said, “We used Mandarin only when it was necessary” (*Leaf*, female, homemaker, 60, focus group #5). *Wes*’ account summarized the different roles Taiyu and Mandarin played in people’s lives:

When I look back, going from elementary school to university, I used Mandarin as a tool for education. We needed it for work too. But it was just that, and there was no special feeling attached to Mandarin. But Taiyu was different. It was home language, something with real life to us. (*Wes*, male, teacher, 65, focus group #10)

The participants clearly asserted the special place Taiyu occupied in their minds, and while they were comfortable using Mandarin they viewed it as a tool for communication to be used when necessary, to get ahead at school or at work. As noted earlier, these interviewees all ended up as members of the middle class, and thus they were perhaps more likely to have accepted the KMT’s hegemonic narrative to achieve their ambitions. This was seen when they talked about using Taiyu and Mandarin with their children. Telling much the same story, albeit from a different angle, as the members of the Japanese group who used Mandarin so that they could talk to their younger family members, this group did not stress the importance of passing using Taiyu in their families, and some of them said that they mainly used Mandarin with their children. However, three couples, *Sam*, *Lily*, *Wes*,



*Mona, Chen, and Leaf*, insisted on using Taiyu in the family. *Sam and Lily* said that they always spoke Taiyu with their children, and thought that the home languages needed to be preserved. *Chen and Leaf* stated, “We are a Taiyu family” (*Chen and Leaf*, couple, 63 and 60, focus group #5). *Wes* not only wanted his children to speak Taiyu, but wanted others to know the importance of preserving home languages too:

Nowadays, the younger generation generally cannot speak Taiyu. This will greatly affect their identification with Taiwan. I think we have a responsibility. We should do whatever we can to use Taiyu, at home and in the society, so that it can be preserved. (*Wes*, male, teacher, 65, focus group #10)

The others, however, did not use Taiyu at home, in the belief that Mandarin was more important for their children’s future success. When recalling the languages they used in their daily lives, *Beam* responded, “We [husband and wife] spoke Taiyu. But with children, we used Mandarin most of the time” (*Beam*, male, teacher, 66, focus group #9). The exchange between *Shine* and *Grace* revealed their views on preserving home languages in the family.

*Shine*: We used “half Taiyu, half Mandarin” in the family.

*Grace*: My children spoke Mandarin at home. They could understand Taiyu but they could not speak it...I spoke Mandarin with my grandchildren.

*Shine*: I have given up asking my grandchildren to learn and speak Taiyu. In order to communicate, I speak Mandarin with them too. It’s a pity if home languages are gone. However, if it is a trend, there is nothing we can do.

*Grace*: I know home languages should be preserved, but still I will not ask my children or teach them to speak it.

*Shine*: Me either. But I do feel that knowing a bit Taiyu is good, as the more languages you speak, the better for you. (*Shine* and *Grace*, female, teachers, 65 and 66, focus group #7)

*Yue* and *Beam* had similar opinions, and said, “We did not force our children to use Taiyu at home. They spoke almost all Mandarin at home” (*Beam* and *Yue*, couple, teachers, 66 and 65, focus group # 9).

One thing worth noting is a pattern emerging here that contrasts those participants who were teachers and those who were not, and may reveal that occupation is a significant factor in how people took hegemonic forces. These participants’ identities as educators may have given them a different perspective on the preservation of Taiyu. As teachers, they were more exposed to hegemonic forces than many people who were not. This was because during this time teachers were compelled to join the KMT. They also had to teach the official curriculum of Mandarinization and Sinification every day. Besides, teachers were more aware of the value of speaking Mandarin, as it was also one of the hegemonic values of the KMT.

During this era when hegemony was being established, a shift to Mandarin use was also occurring, and differences between the Bensheng and Waisheng groups were becoming more pronounced accented. Although the interviewees still felt affection toward Taiyu, their acute sense of the attractiveness of Mandarin, Waishengness, and even northern Taiwanese-ness, as shown in *Wes*’ account, naturally colored their views of Taiyu and

Taiwanese identity. This impact is reflected in how they perceived the link between Taiyu and Taiwanese identity. Unlike the Japanese group, they did not strongly link the two, as revealed in the following accounts.

*Grace*: I do not agree that only people who can speak Taiyu count as Taiwanese people (*Grace*, female, teacher, 66, focus group #7).

*Shine*: I also do not agree with that. But being able to speak Taiyu is good (*Shine*, female, teacher, 65, focus group #7).

*Chen*: I don't think language plays a decisive role in the definition of "Taiwanese people." People can be Taiwanese whether they speak Taiyu or Mandarin (*Chen*, male, professional, 63, focus group #5).

*Lily*: I don't think that a Taiwanese identity should be defined based on Taiyu. But I think home languages need to be preserved (*Lily*, female, teacher, 57, focus group #4).

*Sam*: I don't think national identity is built on language. You can be Taiwanese whether you speak Taiyu or Mandarin (*Sam*, male, professional, 60, focus group #4).

*Wes*, *Mona* and *Ji*, however, strongly linked Taiyu to a Taiwanese identity. *Wes* defined "being Taiwanese" as "living in Taiwan and speaking Taiyu" (*Wes*, male, teacher, 65, focus group #10). So did *Mona*, who stated, "speaking Taiyu, living in Taiwan, and loving Taiwan" (*Mona*, female, teacher, 65, focus group #10). *Ji* echoed their views, "The bottom line is to be able to speak Taiyu" (*Ji*, male, technician, 67, focus group #3).

Most of the participants in the mid-KM group thus did not think that speaking Taiyu was an essential part of Taiwanese identity. *Wes*, *Mona* and *Ji*, who were the exceptions,

were the oldest participants of this group, and it is notable that they grew up when KMT hegemony was at its most tenuous, and consequently held views closer to those of the previous group.

In short, the general pattern displayed in the mid-KMT group, except for *Wes*, *Mona* and *Ji*, shows that when the shift to Mandarin was happening, along with the establishment of KMT hegemony and the imposition of a Chinese identity, the link that the interviewees made between speaking Taiyu and a Taiwanese identity was becoming weaker. However, it should be noted that the Chineseness of Bensheng Ren, like the interviewees, was still regarded as second-rate by Waisheng Ren.

### **Those Growing up after KMT Hegemony Was Established**

#### **(Peak-KMT Group)**

The peak- KMT group grew up when the hegemony of the KMT and the dominance of Mandarin were fully established, which affected the formation of their life-course identities in several ways. First, the shift to Mandarin happened at school and then gradually entered the family, a process that was already well under way at this stage, which meant that participants' links with Taiyu were the weakest of all the groups, and so they accepted Mandarin as part of Taiwaneseess. Second, despite growing up with a Chinese identity they were acutely aware of the class differences between themselves and their Waisheng classmates. Third, as with the mid-KMT group, their Taiwanese identity did not have much space to grow until after the lifting of martial law.

## **Making of Identity**

### **Boundary of an imagined community.**

The terms “Bensheng” and “Waisheng” were often used in the four groups, but with different implications. For the Japanese and early-KMT groups, the two taken-for-granted categories were politicized, carrying with them antagonism and bitterness toward “the other.” “Sheng [province],” a geopolitical division, was also taken as the boundary of an imagined national community, separating the two ethnic groups. For the mid-KMT group that grew up during the establishment of the KMT’s hegemony, in spite of the ill feelings passed on by their parents toward Waisheng Ren, they were educated to become Chinese. The two categories, Bensheng and Waisheng, though still differentiating “us” and “them,” were accommodated under a unified national tag—Chinese, with both groups being Chinese people and thus seen as “Tongbao [fellow countrymen].”

The peak-KMT group grew up after hegemony was fully established, and the different socio-political context gave the two categories different meanings. For the reasons discussed in Chapter 7, the antagonism and opposition between Bensheng Ren and Waisheng Ren seemed to have been neutralized, and while “sheng” was still used as a division line, it was not as sharp as before. Besides, with the KMT’s hegemony fully established, Mandarin and Waishengness were now the dominant, attractive values, and “China” was the common national community shared by both Bensheng Ren and Waisheng Ren.

### **From becoming Chinese to becoming Taiwanese.**

All of the participants in the peak-KMT group recalled having a Chinese identity in the years under discussion, which was different from some members of the mid-KMT group,

who said they did not feel themselves to be Chinese, and most of the Japanese group, who stuck to a Taiwanese identity. Their becoming Chinese was characterized by several features. First, the diplomatic frustrations associated with the KMT's claim that they were representing the only legitimate "China" led to more intense propaganda efforts during the 1960s and 70s, intended to strategically inspire a solid sense of groupness and cultivate Chineseness in the Taiwanese people. The rise of TV during the 1960s and 70s also played a role in facilitating more effective propaganda, and stronger promotion of Chinese nationalism made acquiring a Chinese identity easier. Second, the language shift to Mandarin occurred not only in the public sphere, but it began to enter the family one. The smooth acceptance of Mandarin and its culture is related to the general attitude that the home languages and cultures were not as good as the alternatives from the Mainland, as supported by the KMT's propaganda efforts. In addition, the differences between Bensheng and Waisheng became class-based, which added to the attractiveness of the latter group.

Similar to the experiences of the mid-KMT group, the lifting of martial law played a large part in the development of the identities of those in the peak-KMT group, by making possible a Taiwanese identity. *Mont*, for example, said that a Taiwanese identity had never been part of his life until he was studying abroad in 1989, two years after the lifting of martial law (*Mont*, male, teacher, 45, focus group #6). For *Finn*, "The key point was the knowledge of the 228 Incident. After I had a chance to understand it, I began to ponder why the truth was a far cry from what we were taught" (*Finn*, female, teacher, 53, focus group #11). *Jo*, her husband, added:

After the lifting of martial law in the 80s, I had a chance to read about Taiwanese history and read the documents that were previously banned. Then I began to uncover many things and ponder the education we received in the past. The change in identity happened at that time. (*Jo*, male, teacher, 54, focus group #11)

*Benny* recalled, “I was Chinese until I graduated from university. After that, I was Taiwanese.” For *Benny*, however, the seeds of this identity were planted before the lifting of martial law:

It happened after the Dangwai [anti-KMT] movement began to flourish...The anti-KMT movement was thriving during my university years ...More and more Dangwai people came out to the street...Democratic talks kept coming out which aroused the public’s local consciousness. (*Benny*, male, physician, 51, focus group #2)

*Ali* also recalled that the lifting of martial law was decisive for the emergence of a Taiwanese identity:

It happened when the society became more democratic and more liberal speeches appeared. I remember in the election campaign for mayor in City #1, one of the candidates, *Su*, who later won the election, made outspoken speeches and attracted many people. Before that, there was no place to hear these once disturbing ideas. The lifting of martial law and the granting of freedom of speech was the key to this. (*Ali*, female, securities broker, 45, focus group #4)

As shown in the above testimonies, the rise of anti-KMT Dangwai activities in the 1970s and 80s due to a growing sense of localism had an impact on making the participants see

themselves as Taiwanese after martial law was lifted and moves were made towards democracy, with the discussions of the 228 Incident being very important in this.

*Mont*, for example, had views that were similar to his fellow interviewees. “I will definitely say I am Taiwanese. I want them to know Taiwanese are not the same as Chinese. People [foreigners] are friendlier to Taiwanese people” (*Mont*, male, teacher, 47, focus group #6).

The process of “becoming Taiwanese,” however, did not seem to have happened to *Penny*:

I wouldn’t mark myself as specifically Taiwanese. I will say that I am Chinese. The education I have received equalled the two. And I do not see the need to separate them. We [people in Taiwan and on mainland China] are both Chinese people with the same origin. (*Penny*, female, businessperson, 48, focus group #6)

All the other participants also recognized their Chinese roots, but they did not think that this prevented them from becoming Taiwanese, with only *Penny* insisting on her Chineseness being an unchanging and “authentic” part of her identity. A key point here is that *Penny* had worked with Chinese people throughout her career. She commented that her personal contact with and understanding of people from the Mainland was the major reason for her views. “Now I feel both us and them are Chinese people...After more contact with them in business, I have a different perspective. I know many of them are quite excellent people,” she said (*Penny*, female, businessperson, 48, focus group #6).

The other participants in this group, who experienced a Chinese identity first and a Taiwanese one later, may not have had particularly strong views of the two identities. *Jen*



mentioned that although she did undergo a process of identity change from Chinese to Taiwanese, both of these are somewhat remote and vague identities that she cannot fully relate to:

The textbooks told me I was Chinese. But I felt kind of remotely linked to being a Chinese. However, I felt myself Chinese back then...Now I feel, whether being Chinese in the past or being Taiwanese now, “identities” become like a myth for me. I was taught to believe myself Chinese, without knowing what that meant. Now I know I am Taiwanese, but likewise, I do not have strong feelings for this identity either, probably because I live in the city rather than the countryside. I feel I have confusion in my national identification. (*Jen*, female, teacher, 47, focus group #2)

*Jen* thus implied that where people lived, the city or the countryside, could make a difference in their identity development, but she did not elaborate on this. Her remarks are actually indicative of the views found in the peak-KMT group, as they expressed even weaker connections to Taiyu and Taiwanese-ness than the older interviewees. As will be discussed in the following section, with this weaker connection, the participants were becoming more accommodating in how they defined a Taiwanese identity. That is, the sense of a Taiwanese identity evolved over time, and becoming Taiwanese was thus a different experience for different generations.

### **Meaning of Language**

Growing up during the era when KMT hegemony and Mandarin dominance had been fully established, learning Mandarin was much easier and more natural for the peak-KMT group than for the mid-KMT one. The use of Mandarin was no longer restricted to the

educational sphere, as it had gradually made its way into the family, a step that parents may even have encouraged. At school, the participants recalled using both Mandarin and Taiyu when talking with their classmates, which was different to the experience of their predecessors.

The participants' attitudes toward Taiyu and identity are typified by *Benny's* and *Ali's* accounts below:

I don't think that language is linked to identification. Speaking very good Mandarin does not necessarily mean identifying with China. Likewise, many second-generation Waisheng Ren speak Taiyu fluently, but they just won't identify themselves as Taiwanese. Their family told them that they were Chinese, not Taiwanese. (*Benny*, male, physician, 51, focus group #2)

There is no absolute connection between language and identification, at least I don't think so. I won't say things like "you can speak only Mandarin and you speak no Taiyu, so you are not Taiwanese people." It's not right. (*Ali*, female, securities broker, 45, focus group #4)

Although all of them said they had special feelings for Taiyu as compared to Mandarin, they generally attached less strong feelings to it and were more pragmatic, not seeing it as an indispensable part of Taiwanese identity and more as a communication tool. This weaker link between language and identity was also reflected in some of the participants' opinion that preserving Taiyu was not urgent or important. *Benny*, for example, stated, "I don't think we should look at language too seriously. Both Mandarin and Taiyu are tools of

communication. We use them in order to survive.” He went on to comment on how he felt about languages dying out:

I feel it’s a natural result of cultural evolution. There is no need to mourn a language’s death or emphasize a language or its connection with culture except seeing it as a communication tool...Future generations have their own culture. So, it’s better to just go with the trend. I don’t see why we can’t let a language die just because we think it is our heritage. Mandarin might die one day, as nowadays children learn English, a language they think more important for them. When that day comes, people will eventually speak the same language. Why will that be a problem?

In *Benny*’s view, there is nothing that stays fixed, and languages, like humans, will eventually die:

The world is changing at a surprisingly high speed. Many things that were beyond our imagination are happening nowadays. Many minority languages are dying because they are used by fewer and fewer people. It is a natural phenomenon. Should we resist the trend? I don’t think so. (*Benny*, male, physician, 51, focus group #2)

*Jen* made a similar comment, “I agree with him. I don’t think there is a point in preserving a language just because it links to heritage. Culture is changing; so will languages change or even die” (*Jen*, female, teacher, 47, focus group #2).

Clearly demonstrated in *Benny*’s and *Jen*’s statements is a pragmatic view of home languages, which shows how the meaning of Taiyu had gradually changed for them, and that their connections with the language had become weaker, as compared to the Japanese, early- and mid-KMT groups. This also meant that Taiyu had played a less important role in their

Taiwanese identities, and their ideas about what it meant to be Taiwanese were actually changing. When asked whether they defined part of “being Taiwanese” as “speaking Taiyu,” the interviewees in this group gave similar responses as *Mont*:

He/ she must identify with Taiwan... I won't define it with the ability to speak Taiyu. You see, Ma Ying-Jiu [the President of Taiwan, a second-generation Mainlander] can speak Taiyu. But it is not that you are Taiwanese if you speak Taiyu. (*Mont*, male, teacher, 47, focus group #6)

*Penny* said, “I don't think that Taiwanese people have to be able to speak Taiyu or that as long as you speak Taiyu, you are Taiwanese. These two things do not equate” (*Penny*, female, businessperson, 48, focus group #6). *Jo* noted, “I don't think it right to define Taiwanese-ness via language or how long one lives here. Whether you identify with Taiwan or not is the key.” He further commented, “I would say that Taiwanese refer to those that identify with Taiwan and feel a sense of belonging” (*Jo*, male, teacher, 54, focus group #11). *Finn* expressed a similar perspective, “Taiyu is not so much an important standard for defining Taiwanese people as a sense of groupness” (*Finn*, female, teacher, 53, focus group #11). *Benny* also stated “The definition varies with different eras. You have to identify with the land you live on, with Taiwan as a country, and then you are Taiwanese. Without this identification, you are not Taiwanese even if you live here” (*Benny*, male, physician, 51, focus group #2). These comments show that for the peak-KMT group being Taiwanese is more than cultural, and also involves a subjective sense of belonging and solidarity, just as Renan (1882/1990) and Anderson (2006) argue that a subjective sense of groupness is the most important marker of nationhood. In fact, as shown in their testimonies, the meaning

of being Taiwanese had changed and become more accommodating over their lives, in that speaking Taiyu was no longer seen as a key part of Taiwaneseeness, but a sense of belonging was. Furthermore, one of the participants, *Jo*, made a comment, which was echoed by his wife *Finn*, to strongly support his position of not linking Taiwaneseeness exclusively with Taiyu. In an exchange with *Finn*, he mentioned the issue of “not being ‘authentic’ Taiwanese people,” which was also mentioned in the mid-KMT group by *Yue*, *Beam*, *Grace*, and *Shine*.

*Jo*: I don’t think language is the only criteria for defining Taiwaneseeness. One can be Taiwanese even if he/she does not speak Taiyu.

*Finn*: I also think this definition is too narrow. In reality, a large number of Taiwanese people cannot speak Taiyu nowadays.

*Jo*: We should not define “Taiwanese people” by “being able to speak Taiyu.” In fact, neither Waisheng Ren nor we are authentic Taiwanese people. I really don’t think that taking those who don’t speak Taiyu as non-Taiwanese people or as not loving Taiwan is right.

*Finn*: No, we are in fact not authentic Taiwanese. (*Jo*, male, teacher, 54; *Finn*, female, teacher, 53, focus group #11)

Such a view of “authenticity” is interesting for two reasons. First, that the view is exclusively held by teachers is indicative of the connection between occupation and how people look upon hegemony. Second, such a view may have different implications for people with different dimensions of life experiences. For the mid-KMT group, in view of

their stronger feelings for Taiyu, the importance of “authenticity” likely reflects a sense of uncertainty and instability about “who we really are,” while for the peak-KMT group, based on their much weaker association with Taiyu, their feelings about authenticity on the one hand reveal that people had become more liberal with regard to their definitions. On the other hand, they may reflect their belief that there is no way of defining Taiwanese-ness as something that is “authentic,” fixed, and unchanging.

In brief, a general pattern displayed in the peak-KMT group, besides the weak connections to Taiyu and not seeing it as indispensable part of a Taiwanese identity, is that the participants did not attach much weight to home language preservation, perhaps not surprising due to their views on Taiyu and identity. Moreover, their life-course experiences led to their accommodation of Mandarin in their definitions of Taiwanese identity, a fact that was not seen with the earlier groups. Finally, as noted earlier, in addition to the changing context that they grew up in, their careers as middle-class professionals, and educators in particular, likely meant that they were more affected by the hegemonic forces which shaped the dominance of Mandarin and Waisheng Ren, and thus these also shaped their different understandings of language and identity.

### **Retired Teachers**

The group of retired teachers as a whole powerfully demonstrated the operations of hegemony and its effects on the link between language and identity. It thus also revealed that a person’s occupation plays a part in their understanding of these issues, and thus in their formation of an identity.

First, the retired teachers were more connected to Mandarin, due to their profession, which also suggests a weaker connection to Taiyu. They taught Mandarin at school, either as their main subject or as a tool to teach other ones, because they believed it was important for their students. For the same reason, they did not make efforts to use Taiyu at home. Compared with the other participants, Mandarin played a more central role in their lives, including their careers and families.

Second, their role as teachers and stronger connections with Mandarin also meant a more solid connection to the KMT than that of the non-teachers. Teachers were usually compelled to join the KMT, and thus were more likely to accept its values and interests, whether they were just superficially compliant or not. This was generally the case in this group of retired teachers, except in the cases of *Yochi* and *Mishi*, both from the Japanese group, and who were the most critical of the KMT, and *Beam*, from the mid-KMT group, whose family resentments against the KMT were passed on to him. *Yochi*, unlike his colleagues, did not become a member of the KMT, while *Beam* did join, but said that this was just an empty gesture:

At that time, teachers and officials had to become members of the KMT. I was one of the very few rebellious ones who did not. I thus had to be very careful what I said and did. There were secret policemen at school. We were always under surveillance. (*Yochi*, male, teacher, 75, focus group #1)

*Beam* said, “I was recruited to become a KMT member. But did that mean patriotism? It’s a lie. I discarded my [KMT] membership certificate long ago” (*Beam*, male, teacher, 66, focus group #9).

Teachers were intellectuals who were supposed to engage in more critical thinking and have better, more independent judgement. However since they were both state employees and members of the KMT, this likely made them more susceptible to being influenced by the regime. As a result, their realization of “the truth of the story” and their transition to a Taiwanese identity came after that of the non-teachers. Some, as discussed earlier in this chapter, were even hesitant to assert their Taiwanese identity and said that people who claimed to be Taiwanese were actually not authentically so. *Jo* and *Finn* said they became Taiwanese only several years after the lifting of martial law, when they started to come into contact with some previously banned ideas. However, the participants who had not been teachers, like *Chen*, *Leaf*, *Benny* and *Ali*, said that their Taiwanese-ness emerged as society was becoming more democratic, either during the lifting of martial law or before it.

Third, the idea that one might be born and raised in Taiwan and still be a “non-authentic” Taiwanese person was raised in both the mid- and peak-KMT groups, but this view was only expressed by the retired teachers, namely *Yue*, *Beam*, *Grace*, *Shine*, *Jo*, and *Finn*. As discussed earlier, this view highlights two things. First, it reveals people’s uncertainty about who they really are, since they were, and remain, uncertain about asserting a Taiwanese identity, even after the more liberal social environment allowed them to do so. Second, definitions of Taiwanese identity were becoming more relaxed, with many accepting both Mandarin and Chineseness as part of Taiwanese-ness. Both of these, in fact, had to do with these participants’ professional roles as teachers, which deeply instilled state values and interests in them, and hence produced their stronger links to Mandarin and Chineseness.



In short, the retired teachers' views of Mandarin and Taiyu, and their understanding of Chinese and Taiwanese identity, were related to their careers and relationships with the hegemonic forces of the state. As students, it was likely that they made much effort to learn Mandarin in order to excel in school. As educators, they fully appreciated the importance of speaking Mandarin, so much so that they made less effort than non-teachers to preserve Taiyu in the family. They were thus among the first to move toward the dominant values, and may be the last to move away from them after the lifting of martial law. Their understanding of "the truth of the story" came later than that of the non-teachers, and when it did come, some of them did not seem to embrace their Taiwanese identities as eagerly and confidently as the other participants.

### **Conclusion**

In this chapter, I have discussed the findings of this study and their meanings, in terms of the key concepts of "hegemony," "language," and "identity." "Becoming Taiwanese" actually means different things for participants growing up in different eras. The Japanese and early-KMT groups wrestled between Japanese, Chinese, and Taiwanese identities, and were able to resist hegemony and assert a solid Taiwanese identity defined by Taiyu due to their strong connections with this language. They also displayed a pattern of rejecting a Chinese identity. The mid-KMT group experienced becoming Chinese under the forceful imposition of the Mandarin policy and Chinese nationalism. They thus had weaker links to Taiyu and they more weakly connected it to a Taiwanese identity. They saw themselves as Chinese, but perceived their Chineseness as second rate in contrast to that of the Waisheng cohort. The peak-KMT group grew up with Chinese identities, since KMT hegemony had been fully constructed by this time. Therefore, this group naturally picked up Mandarin.

In addition, while they did experience sharp differences between Bensheng and Waisheng Ren with regard to many social, cultural and economic matters, these were seen as natural and unproblematic. It is thus not surprising that their links with Taiyu were the weakest among the participants, and they tended to define Taiwanese identity with characteristics other than being able to speak Taiyu.

In addition, the retired teacher group appeared to be the least connected to Taiyu, with some even having problems asserting their Taiwanese identity. Since the mid- and peak-KMT groups, especially the latter, were comprised mostly of middle-class professionals, we can say that other life-course factors, such as occupation and class, also affect the formation of identity. In short, the professionals relied more on compliance with the hegemonic forces of the KMT to get ahead in life, while the teachers, as state employees, were more intensely exposed to the state's interests and values.

## Chapter 9 Mapping Language, Hegemony and Identity

In this concluding chapter, I will present the implications of the empirical findings specific to a Taiwanese context in order to theorize about the politics of language, hegemony and identity in general. I raise several points, which on the one hand are my reflections on the meaning of becoming Taiwanese from the contest of language, identity and hegemony, and on the other, are the implications of this contest for language teaching and learning. I also discuss the limitations of my research, and some potential avenues for future studies.

The results of this work show that Taiwanese-ness as an identity is not simply a matter of inheritance, but a large part of it has to be earned. Here I would like to recall Bauman (1996, p. 19), who argues, “‘identity,’ though ostensibly a noun, behaves like a verb, albeit a strange one to be sure, it appears only in the future tense.” Bauman is right, as an identity is never in a complete state, but is always in the making. Nevertheless, although a Taiwanese identity may appear in the future tense, an understanding of it is not possible without tracing it back to the past. I have discussed the need to problematize an identity and theorize it against its own history in my discussion of Rey Chow (2000) in Chapter 1. To take Taiwanese-ness as a taken-for-granted entry voids it of its significance and makes it an empty tag without performances. My research shows that becoming Taiwanese is a journey that not everyone goes through in the same way, or ends up articulating identically. In other words, there are essences that make up the meaning of becoming Taiwanese, and these cannot properly represent Taiwanese-ness if not understood in historical context. As my study has shown, becoming Taiwanese may not be the same journey for all, but going through the contestation of language and hegemony, the two biggest elements of

Taiwanese, is something that is necessary for every Taiwanese.

In what follows, I will consider the meaning of becoming Taiwanese based on the politics of language and hegemony, and show how they inform this process.

### **Language is Political**

There is no denying that languages, as human inventions and social constructions are political in its nature and often used to promote ideologies (Makoni & Pennycook, 2007). This section thus adopts two related perspectives, based on the relationship between language and identity and the wrestling of home/ public language spaces, to look at the politics of language.

#### **Does Language Produce Identity?**

Instead of asserting that language is an indispensable element in one's identity, I would like to approach their relationship from a different perspective.

The oldest Japanese cohort in my study speak Taiyu and assert their Taiwanese through this action. Speaking Taiyu is an irreplaceable part in their being authentic Taiwanese. At the other end of the spectrum is the peak-KMT cohort, who, with the exception of *Penny*, see themselves as Taiwanese but principally speak Mandarin. For them, Taiyu is thus not a key part of their Taiwanese. This means that what counts as important to Taiwanese takes on different meanings for different cohorts. As discussed earlier, the peak- KMT group was more susceptible to the KMT's hegemonic forces, as compared to the other groups, which not only made Mandarin the predominant language in their lives, but led their understanding of Taiwanese to be very different from that of the

Japanese group. As their views of Taiyu changed with their language use shifting to Mandarin, so the content of “being Taiwanese” changed.

In this sense, we can say that language is central to the construction of one’s identity, but not in the direct ways that are commonly assumed, such as—one speaks Taiyu, and is thus Taiwanese; one speaks Mandarin, and so is not Taiwanese. People who speak English could be either British or American, according to this perspective. Such a simplified view essentializes the language-identity relationship, and ignores the many possibilities of language interacting with identity. In fact, whether a person speaks Taiyu or Mandarin, they can still claim to be Taiwanese. That said, whether a person speaks principally Taiyu or Mandarin does define what they think Taiwanesehood is. In this respect, the Canadian context provides a similar example. People who self-identify as Canadians may speak English only, French only, both English and French, or even languages other than English and French, and whether a person is Anglophone or Francophone or neither determines how they see Canadianhood. Therefore, the relationship between language and identity should not be seen as a direct one, but is reflected in the complexities through which people actually define Taiwanesehood based on the language they speak—there are people who speak Taiyu and tie Taiwanesehood directly to this language only; there are Mandarin-only speakers who also see themselves as Taiwanese and not Chinese; there is still another cohort who speak both languages and see themselves as of both identities. All of these represent the inappropriateness of politicizing language as the one and only indicator of national identity. That is also why, as the KMT found, making Mandarin the only acceptable language did not guarantee their hegemony, as they had expected to. Although in the end they succeeded in making Mandarin the main language in Taiwan, the party’s rule eventually collapsed when

the formerly excluded narratives became widely-known with the end of the martial law era.

In addition to the indirect relationship between language and the construction of identity, one significant finding from the interviews is that Taiwanese-ness is not fixed, but instead keeps changing over time. The Japanese group has very different interpretations of Taiwanese-ness to the peak-KMT group. For the former, their Taiwanese-ness is, as Ching (2001) contends, a hybrid of Japanese-ness and Han-Chinese consciousness. It is an identity uniquely arising from their double subjugation to Japanese and Chinese rule. Based on their experiences of living through the Japanese era of “political discrimination and cultural assimilation” (Ching, 2001, p. 91), and their disillusionment with their Han-Chinese connection, they firmly assert their Taiwanese-ness via their connection with Taiyu. The peak-KMT cohort, on the other hand, grew up with a Chinese identity, and had the weakest connection with Taiyu. This group thus did not become Taiwanese until after the lifting of martial law, and so their Taiwanese-ness is defined more by their connection with Mandarin than with Taiyu. As such, there is no way we can define Taiwanese-ness using something that never changes, and there is nothing “authentic” when it comes to identity. The older generations may stick with what Stuart Hall (1990) notes as the concept of “oneness,” the intrinsic part of an identity passed down from one’s ancestors, as the most precious and important element, and insist on its irreplaceability, just as in the minds of the Japanese group Taiyu is an authentic part of Taiwanese-ness, and people who do not speak Taiyu are not Taiwanese. However, the peak-KMT group has a very different perspective about what counts as Taiwanese-ness, and on their identity map, Taiyu is not a prominent element.

## **Language of the Home vs. Language of the Larger World**

From the final stage of Japanese rule until the end of the Mandarin-only era, home and school were mostly two separate spaces—people spoke Taiyu in the former and Japanese or Mandarin at the latter. The two worlds remained separate until near the end of the Mandarin-only era, when the peak-KMT group were growing up, at which point Mandarin established itself as home language. Unlike for the Japanese cohort, when this happened there was no longer a space in Taiwan where the peak-KMT group could escape the hegemony of Mandarin.

Seen from the experiences of the research participants, home as a cultural space was of particular significance. As the recollections of the Japanese cohort show us, their being able to defend their Taiwanese-ness against the imposition of Chinese-ness was due to their strong links with Taiyu, which made their home a sanctuary to escape Mandarin hegemony. Therefore, when Mandarin and Chinese identification were the dominant forces in the outside world, they could still maintain their Taiyu-based Taiwanese-ness. However, when home was no longer a space to escape into, as shown in the case of the peak-KMT cohort, the home language gradually became Mandarin and there was no space for Taiyu in their lives.

The division between inside and outside the home not only defended Taiyu, but also preserved the Taiwanese identity articulated by it. That is, as the division between inside and outside the home changed in different stages of the monolingual policy, so Taiwanese identity kept taking on different meanings. In fact, the politics of the languages of home and the outside, and the contest between the two, informed this changing Taiwanese-ness.

During the Japanese era, language and identity were not an issue until everyone was supposed to speak Japanese and become good imperial subjects. With Japan as the larger world outside the home, Japanese was the hegemonic language, but the participants were able to reserve their home space for Taiyu, and thus kept their Taiwanese-ness. Then when the KMT and Mainlanders came, people became Chinese. China was the larger world, and people were divided into Bensheng and Waisheng, with Taiyu being seen as a dialect and Mandarin the hegemonic national language that gradually established its dominance. Then, in the 1950s, as Mandarin and Chineseness were more strictly imposed, Taiyu still was the language spoken at home, but the larger world had changed, especially when Taiwan ceased to represent the greater China, but became a nation, the ROC, on its own island. During the peak- KMT era, Mandarin gradually took over the space of home, replacing Taiyu. Despite the fact that the two worlds were unified under the same language, the division between outside and inside the home transformed into the division between good and bad Mandarin—the outside world, the Waisheng Ren, spoke good Mandarin, while the world of home, the Bensheng Ren, used bad Mandarin. Taiwan was the larger world, but people were still Chinese. Then, after the lifting of martial law, with Mandarin still being the home language, people became Taiwanese who spoke a Taiwanese version of Mandarin. Taiwan was still the larger world, and the division between the two spaces did not vanish, as now the language valued in the outside world was English.

The politics of the languages of these two spaces continues today. Even now, when the same language, Mandarin, is used in the home and larger world, and thus does not seem to be an issue, the issue of identity remains, with the outside, larger world representing the dominant values that people feel they should aspire to, whether it is good Mandarin or



English. Ching (2001) claims that for Taiwanese people living in the Japanese Kōminka era, their living “between cultural assimilation and political discrimination” and being “an incomplete ‘imperial subject’” (2001, p. 91) made their struggle over identity a fundamental issue. While Ching does not specifically discuss how Japanese as the hegemonic language informed the colonized subjects’ identities, I would like to argue that the politics of language played an essential role in shaping colonial Taiwanese identity. For people in the Mandarin-only era, as the interviewees’ recollections show, their identity struggle was also a fundamental issue which was likely rooted in their inner conflicts between what they perceived of themselves, their inferior Taiwanese-ness, and what they aspired to, the high values of the outside world, i.e., Mandarin and Waishengness. With the enhancement of hegemonic Mandarin and Waishengness, these conflicts deepened, making identity an even more fraught issue.

Thus, as revealed in the cultural politics of the language of the two worlds, there are various competing political factors that shape languages, which not only prescribe what a language is but where and when it is used, and the contest among these has profoundly shaped the changing sense of Taiwanese-ness.

### **Hegemonic Language, Hegemonized Identity**

A change occurred from the Japanese group to the peak-KMT one, from asserting Taiwanese identity via Taiyu to no longer seeing this language as the key component of such an identity, and this was due to the fact that the KMT’s hegemony was gradually established over these years until it became a lived reality for the last cohort. When the hegemony of Mandarin reached into the everyday space of the home, Mandarin replaced Taiyu as a main

part of the last cohort's identities. In this respect, it can be seen that hegemony certainly has an important role in shaping the meaning of language and identity.

In addition, the politics of the language of home and the language of the larger world, as seen in the participants' experiences, reflect how hegemony fixed the related language territories and shaped Taiwanese-ness. But the hegemonic language did not take over the cultural space of the home or become a high value through coercion, one of the two mechanisms that Gramsci claims are used to establish hegemony. Instead, hegemony worked in Taiwan by creating consent, a more symbolic and subtle force, so that people accepted the new culture (Jones, 2006). When good Mandarin or English became the valued languages, people automatically reproduced the dominant values, either to be empowered or to avoid exclusion or ghettoization. Therefore, the construction of hegemony did not need to work by coercion, but it instead exploited the dominated people's aspirations and desires, and thus people gave their consent to the formation of hegemony. That is why Friedman (2005) argues that the realization of hegemony and the formation of a nation-state are actually the products of collaboration between the dominant and the dominated. In this way, hegemony lives on by reproducing and rejuvenating itself in the subordinates' aspirations for empowerment.

However, hegemony is not as simple as the statement that under the KMT's hegemonic rule everybody spoke Mandarin and became Chinese. As I have shown, within the same society, whether or not people can talk about it, they do not live hegemony in the same ways, so there are always different possibilities. Participants' diverse attitudes toward language (Taiyu vs. Mandarin) and identity (Taiwanese-ness vs. Chinese-ness) confirm this. The

Japanese group was able to retain their distinctive Taiwanese-ness, because there was a space in their lives where hegemony did not operate, and that helped them to resist the imposition of Mandarin and Chinese-ness. They separated school and home as two spaces, and did not mix the use of Mandarin and Taiyu in their public and private spheres. Their Japanese experiences also played a role in their resisting Chinese hegemony. By contrast, the peak-KMT group apparently could not create separate spaces in life for Taiyu, but instead Mandarin and Chinese-ness were viewed as high values worth pursuing.

Even within the same cohort, people did not experience hegemony in the same way. Take, for example, the mid-KMT group. The different reactions of *Grace*, *Beam*, *Mona*, and *Wes* to the KMT hegemony and their different understandings of Taiyu and Taiwanese identity, can only be explained when their different family backgrounds are taken into account. What this means is that people's different experiences of the world are the result of many factors working together, which play a part in enhancing or reducing the impact of hegemony.

More specifically, the participants' different experiences with hegemony are reflected in their occupations and social classes. For instance, the retired elementary school teachers, except those from the Japanese group, tended to use much more Mandarin than Taiyu in their focus group interviews, as compared to other participants. This can be explained by the fact that elementary school teachers, as state employees and the executors of the Mandarin-only policy, were more convinced that speaking good Mandarin was a good thing in itself. Dominant values and state interests were thus internalized, and so they were more compliant with and subject to hegemonic forces. Likewise, people who became members of the social

elite were more likely to have been deeply exposed to hegemony and eagerly pursued the dominant values in order to excel, especially when they originally came from lower levels of society. In this regard, the peak-KMT group, with the highest proportion of people who had middle-class careers, as has been shown in Chapter 7, was more exposed to hegemonic values than the other groups. The evidence supports this, as reflected not only in their using Mandarin most of the time, but also in their distinct perspectives on Taiyu and Taiwanese-ness.

However, given the small sample and lack of diversity among the participants, it is difficult to draw a more solid conclusion about the relationship between hegemonic effects and life-course factors such as class. In fact, besides class, this research also has findings that support gender and rural/ urban differences as a factor linking to the effect of hegemony on identity formation. For example, a consistent gender pattern found across all the age cohorts is that women were more concerned about their teachers' bad Mandarin pronunciation, and implied that it was an inferior form of Mandarin, which signified their aspiration to speak standard Beijing Mandarin, the "good" version of the language. Although studies have also confirmed the strong need for empowerment reflected in gender (see for example, Norton, 2000; Heller, 1987), explorations of why such gender patterns arose are not a focus of the current research, as has been noted in Chapter 3. Likewise, the study also reveals urban/ rural differences in participants' experience of getting along with their Waisheng classmates and of being punished for violating the monolingual policy. Nevertheless, the gendered focus groups, as mentioned in Chapter 4, and the small sample, are concerns that can affect the strength of these findings. As a result, these remain unanswered but important issues that need to be examined in future studies. In addition to

gender and urban/ rural factors, because the Mainlanders principally resided in northern, urban areas of Taiwan, which made the north the hegemonic center and the Mandarin spoken there the “good Mandarin” of Taiwan, some geographic differences in the effects of hegemony were found in the accounts of some participants, such as *Wes* and *Chen* from the Mid-KMT cohort. However, since this study adopts only interviewees residing in southern Taiwan, once again a larger sample with greater geographic diversity would be required to support this. Therefore, future studies on this issue should more closely examine the factors of gender, social class, and geography.

As for the theme of the research, “becoming Taiwanese,” the participants’ different experiences of living the Mandarin-only policy and KMT hegemony offer insights into our understanding of not just Taiwanese-ness in particular, but also other identities in general. To begin with, under the premise that identity is fluid and never stops changing, not only is there no “authentic” element that stays fixed and can be found in all people with a common national, ethnic, or racial identity, but identity is also not as simple as the idea that people who go through the same history will share the same identity. This research thus provides evidence to rebut the essentialist view of identity as something “authentic” and unchanging.

Nevertheless, while I agree with theories that see identity as a dynamic shaped in the river of history (see for example, Hall, 1990, 1996; Ibrahim, 2004; James, 1995), I do not see any clear-cut line between people with one collective identity and outsiders. There are, as the findings of this study reveal, many differences and possibilities with regard to how people experience the world. I would thus argue that the second implication of this study for our understanding of identity is that subjects are not passive participants in history, and so are not simply given their identities. Instead, just as Ibrahim (2004) asserts, identity is not

something people are slotted into, but is a “performative category” (p. 77), something they actively do every day. This “performance” points to a human agency that comes in and has an effect on people’s identity work. People actually exert their agency everywhere, in factors such as their consent to be governed by hegemonic values or not, their life-course orientations, and so on, all of which leave marks and make a difference to their identities. As has been shown in this work, when the language of the outside world gradually became Mandarin and Taiyu was marginalized as merely a dialect, by maintaining a home space for Taiyu, the Japanese cohort were able to resist the hegemony of Mandarin. Their agency worked by not giving consent to be governed, which was of great significance in their becoming Taiwanese. By contrast, the mid-KMT and peak-KMT groups complied with the authorities’ values that saw Mandarin and Chineseness as superior. Hegemony thus successfully made the state’s interests into the dominant values people aspired to, and so created their consent to be governed culturally, which was driven by a desire for empowerment.

### **Language Classrooms Are Not Neutral**

The question examined in this thesis asks how people experienced the construction of KMT and Mandarin hegemony during their school years, and how their experiences shaped their perspectives of Taiyu and Taiwanese identity. Among the various findings and insights about language, hegemony, and identity gained in this work, one further thing emerges about the nature of education and language teaching and learning that is worth underlining here. That is, instead of being neutral spaces where only the curriculum is passed on, language classrooms are politically-laden, a site of political struggle (Pennycook, 2007). As argued by many theorists, language classrooms are where different values are

wrestled with and the learners' sense of personal worth and identity are negotiated and fashioned (see for example, Heller, 1987; Ibrahim, 2008, 2009; Norton, 2000; Pennycook, 1998, 1999). It is political because the teaching and learning that occur in such spaces are often appropriated by the desire to comply with or pursue dominant values with the aim of empowerment. As Pennycook (1995) maintains, education is a process of political engagement. The classroom is penetrated not only by the struggles among competing values, but by strategies of exclusion, silencing, negating, neutralization, and de-diversification, all of which make education a political act. This is seen in ESL classrooms around the world, and also in the Mandarin classrooms of Taiwan during the Mandarin-only era.

The awareness that education is not neutral but actually political is essential to educators. Such an understanding encourages teachers to consider the impacts of power, control, resistance, and appropriation in their work, and thus to reshape the related curricula in more inclusive and more democratic ways that can empower the learners (Pennycook, 2007). In the case of Taiwan, this awareness is of particular importance today, when English seems to be becoming the new "good Mandarin." Globalization has made English-speaking world the larger world outside the home, and its culture the predominant discourse for people in developing countries, like Taiwan, to aspire to. There is thus an emphasis on English over Taiyu or other minority languages, as the ability to speak English is linked with a better future, just as speaking good Mandarin was in the past. Studies have shown that such attitudes toward English are increasingly common among both Taiwanese parents and children (M. Chen, 1998; S. Huang, 1995, 2000). When these views translate into language teaching, both good Mandarin in the past and English in the present are

hegemonic forms of knowledge that can ghettoize and marginalize the unprivileged languages, which in both cases are Taiyu and other minority languages in Taiwan, such as Hakka, and this marginalization is also likely to affect how people see their Taiwanese identities.

With an understanding of how the concept of “good Mandarin” shaped people’s current views of Taiyu and Taiwanese-ness, the dangers related promoting English as the new high value language can be foreseen. A language teacher should first and foremost problematize the hegemony linked with a language. It should be kept in mind that the target language in the classroom is often a hegemonic one, which makes language teaching and learning a political as well as cultural activity. That Taiwanese people took Waisheng Mandarin as “good Mandarin” in the past, and, in a more global context, people value “American English” over other Englishes and see it as the most “authentic” form, are examples that show how valued languages are actually products of historical, social, political, and most of all, hegemonic processes.

Drawing from the insights of this research, I also argue that, in face of the hegemony of language, a language teacher will benefit from the knowledge that learners need a cultural space to escape into to retain their connections with their home languages and related identities. A language teacher should thus also problematize the relationship between language and identity, and the results of this study have implications with regard to the inappropriateness of an essentialized or pre-determined view of this relationship. English today, for example, is not the English of the British or Americans exclusively, but is part of many people’s identities, including Indians, Singaporeans, and Canadians, and ESL learners in Taiwan.



In view of this, Pennycook's concept of "global Englishes" is useful in urging language teachers to recognize the many forms of English which inform the many possibilities of identity, and beyond that, to question who gets to decide what form of language is represented as "correct" or "authentic." In a similar vein, based on the research participants' experiences and their life-long relationships with Mandarin, we may need to consider the necessity of "global Chineseness" as a perspective to look at the changing facets and politics of Mandarin. As I have shown, Mandarin was foreign to the Japanese group's Taiwanese identities, but not those of the peak-KMT group. People in Taiwan now speak a Taiwanese version of Mandarin, which would have been considered "bad Mandarin" back in the Mandarin-only era, but now is accepted as the dominant "good" form in Taiwan. Thus it is neither good nor bad, but just different. It is vital that language teachers come to an unessentialized understanding that the many facets of the target language they are teaching are actually a part of the people who speak them. To these people, their languages are real and authentic, and as such the recognition of these languages is vital to an understanding of their identity, their "becoming."



## Appendix A Ethics Approval Notice

**Université d'Ottawa** **University of Ottawa**  
 Service de subventions de recherche et déontologie      Research Grants and Ethics Services

### Ethics Approval Notice Social Science and Humanities REB

#### Principal Investigator / Supervisor / Co-investigator(s) / Student(s)

<u>First Name</u>	<u>Last Name</u>	<u>Affiliation</u>	<u>Role</u>
Timothy J.	Stanley	Education / Education	Supervisor
Chen	Ying-Chuan	Education / Education	Student Researcher

**File Number:** 02-10-27

**Type of Project:** PhD Thesis

**Title:** Language Shift and the Meaning of Becoming Taiwanese

<b>Approval Date (mm/dd/yyyy)</b>	<b>Expiry Date (mm/dd/yyyy)</b>	<b>Approval Type</b>
04/21/2010	04/20/2011	Ia

(Ia: Approval, Ib: Approval for initial stage only)

#### Special Conditions / Comments:

N/A



**Université d'Ottawa** **University of Ottawa**  
Service de subventions de recherche et déontologie      Research Grants and Ethics Services

This is to confirm that the University of Ottawa Research Ethics Board identified above, which operates in accordance with the Tri-Council Policy Statement and other applicable laws and regulations in Ontario, has examined and approved the application for ethical approval for the above named research project as of the Ethics Approval Date indicated for the period above and subject to the conditions listed the section above entitled “Special Conditions / Comments”.

During the course of the study the protocol may not be modified without prior written approval from the REB except when necessary to remove subjects from immediate endangerment or when the modification(s) pertain to only administrative or logistical components of the study (e.g. change of telephone number). Investigators must also promptly alert the REB of any changes which increase the risk to participant(s), any changes which considerably affect the conduct of the project, all unanticipated and harmful events that occur, and new information that may negatively affect the conduct of the project and safety of the participant(s). Modifications to the project, information/consent documentation, and/or recruitment documentation, should be submitted to this office for approval using the “Modification to research project” form available at:

[http://www.rges.uottawa.ca/ethics/application\\_dwn.asp](http://www.rges.uottawa.ca/ethics/application_dwn.asp)

Please submit an annual status report to the Protocol Officer 4 weeks before the above-referenced expiry date to either close the file or request a renewal of ethics approval. This document can be found at:

[http://www.rges.uottawa.ca/ethics/application\\_dwn.asp](http://www.rges.uottawa.ca/ethics/application_dwn.asp)

If you have any questions, please do not hesitate to contact the Ethics Office at extension 5841 or by e-mail at: [ethics@uOttawa.ca](mailto:ethics@uOttawa.ca).

Germain Zongo  
Protocol Officer for Ethics in Research

For Dr. Barbara Graves, Chair of the Social Sciences and Humanities REB

## **Appendix B Participant Recruitment Notice**

(The Chinese translation of the notice will be used.)

I am a doctoral candidate at the University of Ottawa, Faculty of Education. As part of my degree I am studying the experiences of becoming Taiwanese of people living in Taiwan, based on their past school life and their understandings of language, and identity. This research is inspired by my own experience as a Taiwanese who has gone through the Mandarin-only policy and the establishment of KMT dominance. I am supervised by Dr. Timothy J. Stanley, Professor in the Faculty of Education at the University of Ottawa. Ideally, participants in this research will be people living in Taiwan who speak Taiyu as their mother language, who reside in southern Taiwan, and who experienced either the Japanese elementary education, or the Mandarin-only policy, or both between mid-1940s and 1987 as elementary school students or as teachers. Participants will be asked to share their experiences concerning their elementary school life, their learning/ speaking Mandarin and Taiyu at home and at school, their perception of national identification, and their teaching Mandarin if applicable. They will be recruited to join focus group interviews, each of which will take about two hours. Some of the participants may be asked to participate in a follow-up telephone or in-person interview, which lasts approximately 60 to 90 minutes. The purpose of the follow-up interview is to further explore statements of interest or statements that need clarification from the focus group interviews.

Please note that participants may withdraw from the study at any time. The information you share will be confidential. Your name, along with any other identifying information, will be protected through the use of pseudonym. If you would like to participate in this study or if you would like further information, please contact me via email or by telephone.

Your participation is greatly appreciated.

Ying-Chuan Chen  
Ph.D. Candidate  
University of Ottawa  
Recruitment notice in Chinese

## 徵求研究對象

本人是加拿大渥太華大學教育學系博士研究生正在進行博士論文。我的指導教授是 Dr. Timothy J. Stanley。我的研究目的是探討臺灣人的認同和語言之間的關係。我正在徵求的研究對象，條件如下：

- 甲、以閩南語為母語。
- 乙、居住在南臺灣。
- 丙、在一九四零年代到一九八七年之間就讀小學或擔任小學老師。也就是小學時期受過日本教育或經歷過推行國語運動，或是在國語運動時期擔任過小學老師。

研究對象將分組參與團體訪談，談論個人的學校生活關於母語及國語使用經驗，語言政策經驗，以及個人及國家認同經驗。訪談將由研究者主持，參與團體訪談人數每組約二到四人，訪談約兩小時。當中有些參與者可能會再被邀請進行一個電話或面對面的個人訪談，時間約一小時。所有訪談將在受訪者方便的地點和時間進行，訪談內容將會轉述成文字，並在受訪者要求下，讓其核對訪談內容。所有關係個人的隱私和身份，都將用假名處理，以保護受訪者。

如果您願意參與研究，或想要更多關於此研究的資訊，請和我聯絡。  
感謝您的參與。

陳櫻娟

加拿大渥太華大學教育學系博士生

Dr. Timothy J. Stanley

論文指導教授

加拿大渥太華大學教育學系

### Appendix C Participant Consent Form

(The Chinese translation of the consent form will be used.)

Title of study: Becoming Taiwanese: Negotiating Language, Culture and Identity  
Researcher: Ying-Chuan Chen                      Thesis Superior: Dr. Timothy J. Stanley  
University of Ottawa, Faculty of Education    University of Ottawa, Faculty of Education

Invitation to Participate: I am invited to participate in the above mentioned research study conducted by Ying-Chuan Chen, Ph.D. candidate in the Faculty of Education, University of Ottawa.

Purpose of the Study: The purpose of the study is to better understand how people living in Taiwan experienced the construction of KMT and Mandarin hegemony during their school years and how their experiences shaped the meaning of Taiyu and Taiwanese identity for them.

Participation: My participation will include the attendance of one focus-group interview, which will last for about two hours. I understand that I will be asked to answer demographic questions about my linguistic background, about where I live, and about my lived experiences regarding language use and language learning. In addition to the focus group interviews, I understand that I may be asked to participate in a follow-up telephone or in-person interview, which is about an hour in length. The focus group interviews as well as the follow-up interview will be video and audio taped using a digital recorder. Under my request, the quotes from me will be emailed to me for my review. In publications resulting from the study,

I agree to be quoted.                      Yes \_\_\_\_\_      No \_\_\_\_\_

I request a review of my quotes.      Yes \_\_\_\_\_      No \_\_\_\_\_

I understand that I am under no obligation to participate in the study. Both the face-to-face and telephone interview phase of this research are optional. If I do decide to participate, I understand that it will take place at a time and in a location that is convenient for me.

Risks: I understand that my participation in this study will entail/ require that I volunteer personal information, and that the researcher will make every effort to safeguard my identification and use my information only for this research. I also understand that my identification may be recognized by other participants in the focus group sessions. I

have received assurances from the researcher that she will request participants to protect each other's identification, if at all possible.

Benefits: My participation in this study will advance current understanding of the relationship between language and Taiwanese identity.

Confidentiality and Anonymity: I have received assurances from the researchers that the information I share will remain strictly confidential and will be used only for a doctoral dissertation and related publications. I understand that my confidentiality will be protected and that my anonymity will be protected through the use of pseudonyms, and/or fictitious place names.

Conservation of Data: I understand that the data collected will include video and audio-taped recording, transcripts, and researcher notes and that data will be kept secure in a locked cabinet in the office at the University of Ottawa of my thesis supervisor, Dr. Timothy Stanley, over the course of the study and will continue to be for five years after thesis is defended. During the period of data collection (in Taiwan), the data collected will be kept secure in a locked cabinet in the researcher's house. Information will be accessible to only the researcher and the supervisor of this research project.

Voluntary Participation: I understand that I am under no obligation to participation and that if I choose to participate, I may withdraw from the study at any time and/ or refuse to answer any questions without suffering any negative consequences. If I withdraw, I understand that, due to the collective nature of the focus groups, it is not desirable to destroy all the data that concern me, but that all my contributions will be removed from the study.

Questions: I understand that if I have any question about the study, I can contact the researcher or her supervisor. If I have any question regarding the ethical conduct of this study, I may contact the Protocol Officer for Ethics in Research at the University of Ottawa.

Address:	Officer for Ethics in Research	Telephone: 1-613-562-5481
	Tabaret Hall, Room 159	Email: <a href="mailto:ethics@uottawa.ca">ethics@uottawa.ca</a>
	550 Cumberland Street	
	Ottawa, ON, K1N 6N5	
	Canada	

Acceptance: I, \_\_\_\_\_, agree to participate in the above research study conducted by Ying-Chuan Chen of the Faculty of Education, University of Ottawa, under the supervision of Dr. Timothy J. Stanley.

There are two copies of the consent form, one of which is mine to keep.

Participant's Name	
Participant's Signature	
Date	
Researcher's Name	Ying-Chuan Chen
Researcher's Signature	
Date	



## Consent form in Chinese

### 研究對象同意書

研究題目：成為臺灣人：語言、文化與認同

主研究者 陳櫻娟  
渥太華大學教育學系

指導教授 Dr. Timothy J. Stanley  
Professor (教授)  
渥太華大學教育學系

### 邀請參加

我被邀請參加加拿大渥太華大學教育學系陳櫻娟上述的博士論文研究，該研究由加拿大渥太華大學教育學系 Timothy J. Stanley 教授指導。

### 研究目的

我瞭解這研究的目的是探討在推行國語運動時期，不同世代的臺灣人其身份認同和語言之間的關係。研究者希望從這研究中知道語言和語言政策如何影響臺灣人身份認同的塑造，以期能有助於臺灣社會和國際社會能更瞭解臺灣人的身份認同。

### 資格

我必須是符合以下資格，才能參與這研究：

甲、以閩南語為母語。

乙、居住在南臺灣。

丙、在一九四零年代到一九八七年之間就讀小學或擔任小學老師。也就是小學時期受過日本教育或經歷過推行國語運動，或是在國語運動時期擔任過小學老師。

### 參與

我瞭解我將被邀請參與一次團體訪談，談論個人的母語使用經驗，語言政策經驗，以及個人及國家認同經驗。訪談將由研究者主持，參與團體訪談人數約二到四人，訪談約兩小時。我也瞭解我可能會再被邀請進行一個電話或面對面的個人訪談，時間約一小時。所有訪談將在我方便的地點和時間進行。我瞭解我的談話內容有可能會被直接引用在論文上，在此情形下，研究者將會讓我核對引用我的內容的正確性。

我同意被直接引用 是 \_\_\_\_\_ 否 \_\_\_\_\_

我要求核對我被引用的內容的正確性 是 \_\_\_\_\_ 否 \_\_\_\_\_

## **風險**

研究者保證我可以自由的拒絕任何我不想回答的問題，如果我決定不再參與，我可以要求在任何時候退出訪談。

我瞭解在訪談中我將需要提供個人的資料，包括姓名、年齡、性別、居住地、母語背景、教育程度等，研究者保證所有關係個人的隱私和身份，都將用假名處理，以保護受訪者。

## **益處**

作為這研究的受訪者，我將不會直接受益，然而這研究將會有助於瞭解語言如何影響臺灣人身份認同的塑造，並有助於臺灣社會和國際社會瞭解臺灣人的身份認同。

## **匿名**

我瞭解在此研究中，所有關係到我個人的隱私和身份的資料，都將用假名處理，以保護我。

## **研究資料的保密和存放**

我已得到研究者保證，從我這裡收集到的資料，只作為這研究的目的，研究者會要求在團體訪談時，其他的研究對象對於我說的話以及我的身份保密，但是無法保證他們能遵守。所有訪談的資料、電子文件等，都將會存放在渥太華大學 Timothy Stanley 教授的辦公室加鎖的櫃子五年的時間，然後銷毀，只有研究者和她的指導教授 Timothy Stanley 能接觸到這些資料。

## **自願參與**

我是在沒有強迫性下參與，我可以在任何時間，以任何理由退出，我的退出並不會給我帶來任何不良影響。如果我選擇退出，研究者將會銷毀所有退出前收集到的我的資料。

## **關於這研究更多的訊息**

假如我有任何關於這研究的其他問題或是需要更多的訊息，我可以和研究者或是她的指導教授連絡。

假如我有任何關於這研究的倫理道德問題，我可以連絡渥太華大學倫理道德研究制定的部門，地址是 Tabaret Hall, 550 Cumberland Street, room 159, On K1N 6N5, Canada, 電話是 1-613-562-5841，電子郵件地址是 [ethics@uottawa.ca](mailto:ethics@uottawa.ca)

同意：我\_\_\_\_\_ (請用正楷書寫姓名)，簽名同意參與上述的研究。同意書一式兩份，一份將由我收藏。

參與受訪者姓名(請用正楷)	
參與受訪者簽名	
日期	
研究者姓名	陳櫻娟
研究者簽名	
日期	

在任何時候當研究以人為對象時，必須得到參與者書面同意書，渥太華大學制定這規定是尊重參與者，並不表示有任何潛在的風險。

## Appendix D Participant Information

### The Japanese Group

Pseudo-nym	Gender	Birth Year	Occupation	Growing-up Place	Family Background	Highest Education	Language Used in Interview	Focus group #
Mishi	M	1930	elementary school teacher	Urban #1	merchant	teachers' college	Mandarin + Taiyu	#12
Tamu	M	1931	university teacher	Urban #1	farmers	graduate school	Taiyu	#8
Yinno	F	1934	homemaker	Urban #1	unknown	high school	Taiyu	#8
Yochi	M	1935	elementary school teacher	Rural #2	farmers	teachers' college	Mandarin + Taiyu	#1
Shinn	M	1936	business owner	Suburban #1	farmers	vocational high school	Taiyu	#3
Daisy	F	1936	homemaker	Urban #1	unknown	university	Taiyu	#8
Wong	M	1937	merchant	Rural #2	farmers	vocational high school	Mandarin + Taiyu	#1

### The Early-KMT Group

Pseudo-nym	Gender	Birth Year	Occupation	Growing-up Place	Family Background	Highest Education	Language Used in Interview	Focus group #
Mishi	M	1930	elementary school teacher	Urban #1	merchant	teachers' college	Mandarin + Taiyu	#12

Tamu	M	1931	university teacher	Urban #1	farmers	graduate school	Taiyu	#8
Yinno	F	1934	homemaker	Urban #1	unknown	high school	Taiyu	#8
Yochi	M	1935	elementary school teacher	Rural #2	farmers	teachers' college	Mandarin + Taiyu	#1
Shinn	M	1936	business owner	Suburban #1	farmers	vocational high school	Taiyu	#3
Daisy	F	1936	homemaker	Urban #1	unknown	university	Taiyu	#8
Wong	M	1937	merchant	Rural #2	farmers	vocational high school	Mandarin + Taiyu	#1
Yo	F	1940	homemaker	Rural #1	farmers	junior high school	Taiyu	#3
Manny	F	1940	elementary teacher	Suburban #1	civil official	teachers' college	Taiyu + Mandarin	#12

#### The Mid-KMT Group

Pseudo-nym	Gender	Birth Year	Occupation	Growing-up Place	Family Background	Highest Education	Language Used in Interview	Focus group #
Ji	M	1943	technician	Rural #1	farmers	high school	Taiyu	#3
Grace	F	1944	elementary teacher	Rural #1	national enterprise	teachers' college	Mandarin + Taiyu	#7
Beam	M	1944	elementary teacher	Urban #1	national enterprise	teachers' college	Mandarin + Taiyu	#9

Shine	F	1945	elementary teacher	Urban #1	carpenter	teachers' college	Mandarin + Taiyu	#7
Wes	M	1945	high school teacher	Rural #4	civil servant	university	Taiyu + Mandarin	#10
Mona	F	1945	high school teacher	Rural #4	herbal doctor	university	Taiyu + Mandarin	#10
Yue	F	1945	elementary teacher	Urban #1	farmers	teachers' college	Mandarin + Taiyu	#9
Chen	M	1947	professional	Suburban #1	carpenter/ farmers	university	Taiyu	#5
Sam	M	1950	professional	Rural #1	farmers	university	Mandarin + Taiyu	#4
Leaf	F	1950	homemaker	Suburban #3	lumber trade	Junior college	Taiyu	#5

#### The Peak- KMT Group

Pseudo-nym	Gender	Birth Year	Occupation	Growing-up Place	Family Background	Highest Education	Language Used in Interview	Focus group #
Sam	M	1950	professional	Rural #1	farmers	university	Mandarin + Taiyu	#4
Leaf	F	1950	homemaker	Suburban #3	lumber trade	Junior college	Taiyu	#5
Lily	F	1953	high school teacher	Rural #1	farmers	university	Mandarin + Taiyu	#4
Jo	M	1956	elementary teacher	Rural #1	farmer	teachers' college	Mandarin	#11

Finn	F	1957	elementary teacher	Rural #1	plumber	teachers' college	Mandarin	#11
Benny	M	1959	physician	Rural #1	civil servant	PhD	Mandarin	#2
Penny	F	1962	Businessman	Rural #5	unknown	university	Mandarin	#6
Jen	F	1963	high school teacher	Urban #4	civil servant	university	Mandarin	#2
Mont	M	1963	university teacher	Urban #1	unknown	PhD	Mandarin + Taiyu	#6
Jim	M	1964	Self-employed	Urban #1	university teacher	university	Mandarin + Taiyu	#8
Ali	F	1965	securities broker.	Suburban #1	farmers	university	Mandarin	#4

## Appendix E Interview Guide

September 5, 2010

### (1) Questions about past school experiences

- First day of school
  1. What do you remember about your first days of school high school?
  2. What are the differences that you noticed between school and family?
  3. Do you have siblings? Were you the first child that attended school in your family?
  4. What did people around you talk about school?
- School life
  1. Can you describe a typical day at school?
  2. Can you describe your class/ school composition? How did students get along? What were the languages used by students?
  3. Do you remember any problem or trouble at school resulting from speaking different languages?
  4. Is there anything about school or teachers that you would like to mention?

### (2) Questions about past experience of learning/ speaking languages

- About Taiyu
  1. How and when did you learn it?
  2. How was Taiyu used in your daily life and your family?
  3. What was your family's attitude toward speaking Taiyu?
  4. Did you speak Taiyu at school? Where and When?
  5. Were people punished because they spoke Taiyu?
  6. Can you describe a typical event that you remember about Taiyu?
- About Mandarin
  1. How and when did you learn it?
  2. How was Mandarin used in your daily life? Who did you use Mandarin with?
  3. What was your family's attitude toward learning/ speaking Mandarin?
  4. What did you think about learning Mandarin? Did you feel it important? Why?
  5. How did you feel about your teachers that taught you Mandarin, their fluency, attitude, standard, etc.?



6. Did you and your friends/ siblings have difficulty learning Mandarin, and if yes, what were the difficulties? What were your reactions? Did people complain about learning Mandarin?
7. Was your experience of learning Mandarin a happy or unhappy memory?
8. Can you describe a typical event you remember about Mandarin?

(3) Questions about national identification

- Think about this--If you were explaining who you are to someone from another country, what would you say? How do you define who you are?
  1. During NLM period, did you feel yourself Chinese? Why or why not? What made you feel so? How about before you started school?
  2. If you did, was that because of Mandarin? So, what do you think about the relationship between ‘speaking a language’ and ‘becoming a person of that nationality’?
  3. Have you ever have national identity change, for example, for Chinese to Taiwanese or vice versa? What do you think caused the change?
  4. So, how important is it to speak Taiyu to become Taiwanese to you? How important it is to speak Mandarin to become Chinese?
- Your Taiwaneseess
  1. What does it mean to you to be Taiwanese? What makes you think yourself Taiwanese?
  2. When did you start feeling it? Did it make you different from others in your lifeduring the NLM era? What were the differences?
  3. Were you proud of your Taiwanese and Taiyu back in your school days? (Are you proud of them today?) Why or why not?
  4. How did people around you, including Waisheng Ren and Bensheng Ren talk about Taiwaneseess?
  5. How did you see your Waisheng classmates at that time? Were they different from you?
- Your Chineseness
  1. What does it mean to you to be Chinese? What made you feel yourself Chinese during the NLM period?
  2. When did you start feeling your Chineseness?
  3. How did people around you talk about or feel about it?
  4. Where do you think was your Chineseness from?

(4) Questions about living nationalism in daily life

● At school

1. What subjects were taught at school?
2. What did citizenship education teach you?
3. Who taught these subjects? What do you remember about your teachers and their teaching?
4. Was speaking Mandarin regarded as being patriotic? Do you remember any advocacy about the linkage between language and nationalism?
5. What do you remember about the national flag-raising ceremony or the national mourning period following Chiang Kai-shek's death? How did you feel about them?
6. When did you start to know about national holidays, national flag, and national heroes? How did you learn about them? Did you ever have questions about them?

● At home

1. What did newspaper, TV and radio say about speaking Mandarin and being Chinese?
2. What did they say about Taiyu and Taiwanese-ness?

(5) Questions about past experience of teaching Mandarin (for the retired elementary school teachers)

- What were the problems or difficulties you encountered in teaching Mandarin, technically and psychologically?
- Did the students want to learn Mandarin?
- Did you punish students for speaking Taiyu at school? What were your students' reactions to the punishment?
- What language did students use at school?
- How did you feel about the Mandarin-only policy as a student and as a teacher? Did your feelings ever change?

(6) Questions about newspaper representation of National Language Movement

- Have you seen these reports? How did you feel about them?
- What sort of things were people saying about them?

(7) Is there anything else you would like to tell me or share here?

## Interview guide in Chinese

September 5, 2010

Interview Guide 訪談問題 (回想過去)

訪談者:陳櫻娟

### (1) 小時候上小學/初中/國中的經驗

#### ● 剛上學時

1. 你對那時候有什麼印象?有注意到學校和家裡有不同嗎?尤其是語言使用上?
2. 你有兄弟姐妹嗎你是家裡第一個上學的孩子嗎?在入學前有聽過關於學校生活的事嗎?

#### ● 在學校

1. 能請大概描述學校的一天嗎?
2. 你能描述一下學校學生的族群組合嗎?相處狀況?語言使用狀況?你記憶中有因為說語言(國語/台語)的問題引發的同學間的衝突嗎?有的話學校和老師如何處理?
3. 關於學校和老師你有沒有什麼事印象特別深刻想分享的?

### (2) 過去學習國語和母語的經驗

#### ● 台語

1. 你是何時開始學台語?怎麼學到的?
2. 你和你家人日常生活是不是都用台語?家裡父母親對於說台語是怎樣的態度?
3. 在學校你也用台語嗎?什麼時候什麼地方說台語?
4. 你記得周圍有人因為講台語被處罰的嗎?
5. 關於講台語,你有沒有什麼事印象特別深刻的?

#### ● 國語

1. 你是何時開始學國語?怎麼學到的?
2. 在生活中你何時什麼場所用國語?和誰講國語?
3. 家裡父母親對於說國語和學國語的態度是?為什麼?
4. 你自己那時候的態度呢?你感覺很重要嗎?為什麼?
5. 學校中的老師多是台灣人嗎?教你國語的老師是台灣人嗎?他們的國語流利嗎?標準嗎?教的如何?勝任嗎?
6. 在學國語這個經驗上,你記得你或你的同儕有什麼問題或困難嗎?對你們來說,最難的是什麼?你們的反應是?有聽過大家在抱怨學國語說國語這件事嗎?
7. 你的學國語經驗是快樂的回憶嗎?

8. 關於講/學國語,你有沒有什麼事印象特別深刻的?

(3) 關於”我是誰”

- 先想想--如果有外國人問你你是哪裡人,你會怎麼回答?你怎麼定義這個答案?
  1. 在推行國語政策時期你有認為自己是中國人嗎?為什麼你這樣認為/ 為什麼你不這樣認為?在那之前(例如入學前)呢?
  2. 如果你那時候有認為自己是中國人,是因為國語政策的關係嗎?你覺得說什麼語言有多影響一個人的國家認同/影響他認同自己是那個國籍?
  3. 你曾經有過認同上的混淆(中國人或臺灣人)嗎? 是語言引起的嗎? 還是其他的?
  4. 請你描述你的感覺中,這四者的關係”講國語”, ”講台語”, “中國人/認同中國”, “臺灣人/認同臺灣”?
  5. 請你假想--如果沒有國語政策加在臺灣人身上,你的認同是不是會不一樣? 想想如果生活裡只有一種語言(例如只用台語沒有國語),認同會是怎樣?
- 你的 Taiwanese/ 台灣性
  1. 你如何定義自己是台灣人?是什麼東西讓你認為自己是台灣人?
  2. 你什麼時候開始意識到自己的台灣性?這個台灣性有讓你和你周圍的人不同嗎(指國語政策年代)?什麼不同?
  3. 你有什麼感覺?在那時候你以講台語和你的台灣性為榮嗎?今天呢?為什麼(不)?
  4. 那時候你周圍的人,包括本省和外省人,怎麼看/談論台灣人/台灣性?
  5. 你自己在那時怎麼看本省和外省人?你有覺得什麼不同嗎?
  6. 你感覺能讀台語字/文對成為台灣人/認同台灣有多重要?
- 你的 Chineseness/ 中國性
  1. 在那時候你感覺”是中國人”是什麼意思?
  2. 你什麼時候開始意識到自己的中國性?
  3. 那時候你周圍的人怎麼看/談論中國人/中國性?
  4. 你感覺在那時候你的中國性是從哪裡來的?
  5. 你感覺使用中文文字和認同中國關係密切嗎?

(4) 學校/社會教我們做中國人

- 在學校
  1. 學校教哪些科目?有教台灣歷史或地理或語言嗎?
  2. 公民教育教些什麼?

3. 誰教這些科目?你記得他們的教學嗎?
4. 你記得這句”車同軌,書同文”嗎?你覺得它在教你什麼?
5. 那時宣導說國語就是愛國嗎?你那時接受”一個統一的國家就應該有一個國語”的說法嗎? “語言統一是為了促進國家團結”的說法嗎?
6. 你對每天的升降旗典禮有什麼印象?那時候有什麼感覺?
7. 你對蔣介石去世後的國殤期間有什麼印象?那時候有什麼感覺?

- 在家

1. 你記得關於”講國語,做中國人”,報紙電視怎麼說?
2. 你記得關於”講台語,台灣人”,報紙電視怎麼說?
3. 你何時注意到”國定節日,國旗,國家英雄”這些東西?對它們的存在你有過疑問嗎?

(5) 過去教國語的回憶

- 在教本省學生國語時,你有什麼記憶?有遭遇到問題困難嗎?(包括技術上和學生心理上)
- 學生們對學國語的態度是? 他們很樂意學嗎?
- 有教過再怎麼教怎麼罰都還是常說臺語的學生嗎?為什麼他都說臺語?被處罰的反應呢?
- 學生們在學校都用國語交談嗎?下課時間呢?
- 請問就你自己當學生和當老師時,對國語政策有不同的感受嗎?是怎樣不同?

(6) 媒體對國語運動的呈現

- 你對國語運動的感覺?
- 你看過這幾篇新聞嗎?什麼時候看到的?你覺得報導真實嗎?你有什麼印象?
- 你記得身邊的人對這些報導的反應嗎?

(7) 還有什麼你想跟我們分享的嗎?

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