Preface

On February 28th, 1947, soldiers from the Chinese mainland beat a Taiwanese cigarette seller in a park in Taipei City, sparking mass rioting and a near uprising against the brutality of the occupying Kuomintang (KMT) state. Local mobs marauded through the streets, attacking newly-arrived mainland Chinese immigrants. With little distinction in racial characteristics, the mainlanders were identified by the languages they spoke. In the tumult, Dai Guo-hui, a Taiwanese writer, found himself confronted by one such gang. As a Hakka speaker, he was unable to speak the dominant Taiwanese language, Hoklo. Thinking on his feet, Dai burst into a rendition of the Japanese national anthem, in Japanese. It saved his skin: he proved that he was not a mainlander by singing in the language of Taiwan’s former colonizers. This vignette, as related by Hughes (1997: 28), aptly captures the welter of language, politics, and identities in Taiwan, the subject of this book. Though a fleeting moment in the middle of the twentieth century, the underlying themes resonate much further: back into the past to Dutch rule of the island in the seventeenth century, and forward in time to the current situation of democratization in the twenty-first. They are themes of complex linguistic and political loyalties, and of often violent antagonisms between the state and society. They are continuities which structure a historical narrative, but blur the distinctions between colonization and decolonization, and nationalism and globalization.

This book uses Taiwan as a case study to develop a theoretical framework of a political sociology of language. As such, it traces the contours of the relations between language, society, and the state in Taiwan across different historical-structural paradigms. The research questions articulated here are interrelated: What are the constants in the relationships between language, society, and the state as their precise dynamics are transformed? How does language operate as a fulcrum between society and the state in terms of both state-making and political resistance? What socio-political structures and historical processes have influenced Taiwan’s contemporary linguistic situation? How are linguistic nationalisms produced in and by local contexts? How are these articulated in the post-national and denationalized context of globalization?

This brief preface sketches Taiwan’s contemporary geopolitical situation as well as its sociolinguistic context. It then outlines the structure of the book as overall, and the narrative trajectory that it takes. Notes are also included on the difficulty of ethnic categorization, and the terminology used for different groups, as well as the Romanization conventions used.

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1 Contemporary Taiwan in geopolitical context

A rugged volcanic island lying across the Tropic of Cancer approximately 160 km off the south-eastern coast of China, and 650 km south-west of the Japanese island of Okinawa, Taiwan is variously described as shaped like a yam, or sweet potato, or a rolled tobacco leaf. Around 400 km long and 145 km across at its widest point, the island is home to some 23.5 million people mainly crowded into lowland areas around the coast; half the island is covered by rough jungle terrain, making parts of Taiwan some of the most densely populated areas on the planet. Its small size belies its considerable influence in south-east Asian and global political affairs. Taiwan is a contentious piece of strategic territory, ever in the diplomatic or military cross-hairs of China, its larger neighbour across the Taiwan Strait, or the US, its chief ally across the Pacific. Beijing has long viewed Taiwan as a renegade Chinese province to be “reunited” with China, by force if necessary; it aims some 1,600 missiles at the island to underscore its point, though it has not seriously rattled its sabres since the first free elections in 1996. But Taiwan has never been part of the political unit of the People’s Republic of China (PRC) since the latter’s inception in 1949, and so Beijing’s goal of “reunification” may be more accurately described as “annexation”. The PRC has a “three noes” policy: no independence, no “two Chinas” or “one China, one Taiwan”, and no Taiwanese membership in international organizations where statehood is required. Part of the difficulty for the PRC is the fear that if it allows Taiwan to declare itself as a free nation-state, then others in the Sinosphere – most notably, Tibet and the Uighur homeland of Xinjiang Province – will follow suit.

The US, under the Taiwan Relations Act, is legally obliged to offer certain defensive assistance to the island, but this is contingent on Taiwan not declaring itself as an independent country, even though to all intents and purposes it functions as one. It has its own democratically-elected government, an independent judiciary, and a standing army, navy, and air force. Its free-market, export-oriented economy – developed through the “Taiwan Miracle” of industrialization in the 1960s and 1970s – means Taiwan is often referred to as one of the four “Asian Tigers”, along with Hong Kong, Singapore, and South Korea. It maintains its own immigration and border controls, has its own flag, national anthem, and currency, and over 90% of the population identify themselves as in some way Taiwanese according to survey data (ESC 2017a). Largely unrecognized by the international community, however, Taiwan exists in a diplomatic no-man’s-land as a nation without statehood.

These tensions fundamentally structure Taiwan’s internal politics; since 2000, elements of the pan-green coalition, led by the Democratic Progressive Party (DPP), favour independence while elements of the pan-blue coalition, led by the
Kuomintang (KMT), favour if not unification per se then increased rapprochement towards the PRC. In reality, centrists in both the DPP and KMT occupy an ideological middle-ground; in line with the wishes of most of the population, who have no desire to be embroiled in a costly and potentially unwinnable war, both parties have been content to maintain an uneasy status quo. For Ma Ying-jeou, former KMT president, this meant a different sort of “three noes” policy than Beijing’s: no unification, no independence, and no use of force. Maintaining the status quo is seen by many as a pragmatic way to retain the economic and political freedoms that have allowed Taiwan to become a prosperous liberal democracy. Absent an opportunity to assert full independence and sovereignty, energies have been channelled into a form of cultural nationalism, in which both the pan-blues and pan-greens have deployed a multi-ethnic, multicultural, and multilingual Taiwanese identity for political purposes.

2 The sociolinguistic context

The complexities of Taiwan’s sociolinguistic context are the subject of this book, and so it is only possible to give a brief summary here. Contemporary Taiwan is richly multilingual, with sixteen living Austronesian languages spoken by indigenous groups out of an original twenty or so, and over forty known dialects (see Appendix). Additionally, three mutually unintelligible Sinitic languages – Mandarin, Hoklo, and Hakka – are spoken widely in society. The Sinitic languages were brought by immigrants from China who arrived in various waves between the seventeenth and mid-twentieth centuries. Since the mid-1990s, cross-border marriage migration, mainly from south-east Asia, has brought languages such as Vietnamese, Tagalog, and Cambodian into Taiwan’s sociolinguistic situation. Of course, there is also the presence of the global language of English, learned seemingly by everybody but spoken by relatively few. Table 1 summarizes the languages, origins, and demographic distribution of these groups, while Table 2 summarizes the percentages of languages used at home by age group, according to the 2010 census.

Mandarin is the dominant national language, used for official purposes, the medium of instruction in education, and in the media. Since 2017, Taiwan’s indigenous Austronesian languages have been elevated to co-national status, though this is largely symbolic since almost half are classified as endangered. With this said, according to census data 1.4% of the Taiwanese population use indigenous languages at home (DGBAS 2016), with slightly over 2% identifying as indigenous, though this is shifting among younger speakers with less than 60% of speakers aged six to twenty-four using their language at home, compared to some
Table 1: Language distribution in Taiwan. Populations are approximate given the difficulty of establishing ethnic identities, and do not total 100% due to rounding.

<table>
<thead>
<tr>
<th>Ethnolinguistic group and historical language(s)</th>
<th>Origin and date of migration to Taiwan</th>
<th>Approximate % of population by ethnic group</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Hoklo</strong></td>
<td></td>
<td>70%</td>
</tr>
<tr>
<td>Hoklo also known as Hokkien; Southern Min/Minnanhu; Tai-gi; Tai-yu; Taiwanese</td>
<td>Southern Fujian Province, China</td>
<td></td>
</tr>
<tr>
<td>Sinitic branch of Sino-Tibetan</td>
<td>17th century onwards, during Dutch colonial rule</td>
<td></td>
</tr>
<tr>
<td>Mutually unintelligible with Mandarin or Hakka</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Mainlanders</strong></td>
<td></td>
<td>10%</td>
</tr>
<tr>
<td>Taiwan Mandarin or guoyu (possibly a creoloid derived from Mandarin/ Wu/ Cantonese/Gan etc. language contact)</td>
<td>Various provinces, China</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1945–1949, following end of Japanese colonial rule (1895–1945) and KMT defeat in Chinese civil war (1949)</td>
<td></td>
</tr>
<tr>
<td>Sinitic branch of Sino-Tibetan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mutually unintelligible with Hoklo or Hakka</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Hakka</strong></td>
<td></td>
<td>15%</td>
</tr>
<tr>
<td>Hakka</td>
<td>Guangdong Province, China</td>
<td></td>
</tr>
<tr>
<td>Sinitic branch of Sino-Tibetan</td>
<td>17th century onwards, during Dutch colonial rule</td>
<td></td>
</tr>
<tr>
<td>Mutually unintelligible with Mandarin or Hoklo</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Formosans/indigenous peoples</strong></td>
<td></td>
<td>&gt;2%</td>
</tr>
<tr>
<td>20+ languages/40+ dialects (see Appendix)</td>
<td>Asian mainland</td>
<td></td>
</tr>
<tr>
<td>Formosan branch of Austronesian</td>
<td>4500–4000 BCE</td>
<td></td>
</tr>
<tr>
<td>No phylogenetic relationship with Sinitic languages</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
three-quarters of those aged over sixty-five. Hakka, like indigenous languages, has undergone shift to Mandarin, particularly among younger speakers; according to the same census data (DGBAS 2016), perhaps 6.6% of the total Taiwanese population speak Hakka at home (compared to as many as 10.1% of over-65s), though some 15% of the population identify as ethnically Hakka. Hoklo remains resilient, spoken at home by upwards of 95% of the population in some areas, and around 81.9% of the population overall (DGBAS 2016), with the number of speakers exceeding the number of nominally “ethnically” Hoklo indicating its status as a lingua franca and the prevalence of Mandarin/Hoklo bilingualism or Mandarin/Hakka/Hoklo trilingualism. Hoklo language shift is occurring among younger

Table 1 (continued)

<table>
<thead>
<tr>
<th>Ethnolinguistic group and historical language(s)</th>
<th>Origin and date of migration to Taiwan</th>
<th>Approximate % of population by ethnic group</th>
</tr>
</thead>
<tbody>
<tr>
<td>New immigrant spouses</td>
<td>China; Vietnam; Indonesia; Thailand; Philippines; Cambodia 1990s–2000s through cross-border marriages</td>
<td>~2%</td>
</tr>
</tbody>
</table>

Sources: Huang (1995); Ethnologue (2017).

Table 2: Percentage use of languages at home by age according to relative frequency in census data from 2010. Respondents may use more than one language at home. For Hoklo, reported language use exceeds the number of nominally “ethnic” Hoklo, indicating its function as a society-wide lingua franca. The relatively high percentage of “other” languages among those aged 65 or over is likely due to the lingering effects of Japanese-spread.

<table>
<thead>
<tr>
<th></th>
<th>Mandarin</th>
<th>Hoklo</th>
<th>Hakka</th>
<th>Indigenous</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>83.5</td>
<td>81.9</td>
<td>6.6</td>
<td>1.4</td>
<td>2.0</td>
</tr>
<tr>
<td>6–14 years</td>
<td>96</td>
<td>69.7</td>
<td>3.8</td>
<td>1</td>
<td>0.8</td>
</tr>
<tr>
<td>15–24 years</td>
<td>94.9</td>
<td>78.6</td>
<td>4.8</td>
<td>1.3</td>
<td>1</td>
</tr>
<tr>
<td>25–44 years</td>
<td>91.2</td>
<td>83.7</td>
<td>6</td>
<td>1.4</td>
<td>2.1</td>
</tr>
<tr>
<td>45–65 years</td>
<td>77.9</td>
<td>86.4</td>
<td>8.2</td>
<td>1.5</td>
<td>2.6</td>
</tr>
<tr>
<td>65+ years</td>
<td>45.3</td>
<td>81.7</td>
<td>10.1</td>
<td>1.3</td>
<td>3.1</td>
</tr>
</tbody>
</table>

Source: DGBAS 2016.
speakers, however; 81.7% of over-65s use it at home, compared to 69.7% of speakers aged between six and fourteen. However, apparent age-graded shift in Hoklo does not take into account the fact that speakers may return to the language after university and when entering the workforce (particularly when returning to family businesses).\(^1\) Foreign spouses speaking south-east Asian languages often learn Mandarin or Hoklo to integrate or assimilate into Taiwanese society, though they are often traditionally discouraged (or prevented) from transmitting their languages to their children.

The historical-structural reasons for language shift are explored in chapters three and four. However, state- and civil society-driven strategies have been mobilized for the purposes of language maintenance and language revitalization as the result of increasing socio-political liberalization since 1987. Multilingualism is strongly associated with democratization and a pluralistic national identity. This has been focused on indigenous and autochthonous languages, but new immigrant languages are increasingly included in revitalization and maintenance programs, both ideologically and practically. The political context of language revitalization is explored in chapters five and six.

3 The problem of ethnic categories

Ethnicity is a problematic category when writing about Taiwan, and this complicates the definition of ethnolinguistic groups (see Table 1). The indigenous peoples – sometimes called Aboriginals or Formosans – share a common linguistic ancestor in proto-Austronesian, and have collectively suffered the blunt end of colonial interventions since the seventeenth century. I refer to “indigenous peoples” as a collective group, but it must be remembered that they are culturally and linguistically disparate and distinct. The Hakka- and Hoklo-speaking ethnolinguistic populations – that is, the historical ethnolinguistic groups that can be defined by assuming a one-to-one correspondence with ethnicity and language – migrated from China from the seventeenth century. I call these groups collectively “Han”, in order to distinguish them

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\(^1\) Chen (2010) paints a more pessimistic picture of age-graded language shift, taking into account both reported fluency and reported language use at home. She uses a considerably smaller and less statistically robust sample than the DGBAS (2016) data from the 2010 census. In addition, her data is from 2003, only shortly after language revitalization strategies in schools and wider society had been put in place.
from both the indigenous groups and the “mainlanders” who themselves constitute a nominally ethnic group, according to Brown (2004: 10), and who migrated from China between 1945 and 1949, as well as from the Japanese and Dutch colonizers. The problem here is that the mainlanders are – in terms of cultural practices such as religion, festivals, and ancestor worship – also ethnically Han. Furthermore, intermarriage between male Han settlers and indigenous women has, historically, diluted any claims to “pure” Han ethnicity. The designation of Han for the Hakka and Hoklo groups is thus a convenient sociological and political fiction that gets around the thorny problems of describing both older and newer migrants from China as collectively “Chinese”, as well as collectively describing indigenous and Han groups as “ Taiwanese” (which would suggest that they historically saw themselves as such, or at least collaborated as socio-political actors, which was rarely the case).

4 A note on Romanization

In and of itself, the decision about which system of Romanization to use to phonetically represent Mandarin words can be politically and ideologically contentious. Since January 1st, 2009, the official Romanization system in Taiwan is Hanyu pinyin. I have chosen to use the Hanyu pinyin system for pragmatic reasons: it is, to my mind, a simpler and more coherent transliteration. For place names, I have used the transliteration likely to be most familiar to Taiwan specialists and non-specialists alike. Somewhat confusingly, these can be a mixture of either Hanyu pinyin, the previously-used Tongyong system, or the older Wade-Giles system, and may or may not be the version used on official documents before 2009. Thus, for example, the common rendering of “Miaoli” is the same in Tongyong and Hanyu pinyin; the older Wade-Giles “Kaohsiung” is the most common transliteration, though its Hanyu pinyin equivalent is in fact “Gaoxiong”, a term rarely, if ever, seen; and so on. For proper names, I also use the most common transliteration: Sun Yat-sen, for example, retains the common transliteration of his Cantonese name, as opposed to the uncommon Mandarin rendering Sun Yi-xian. For contemporary politicians, I use the most common transliteration from media reports and other documents; different politicians adopt different (and sometimes idiosyncratic) Romanization conventions. Names referring to the authors of academic texts follow their published forms verbatim. All Chinese and Japanese surnames in this book come before the first name (e.g. Chen Shui-bian), except in a few cases where an English first name and Chinese surname are used commonly by authors, public figures, or politicians (e.g. Annette Lu).
5 Structure of this book

This book is comprised of three roughly equal parts of two chapters each, examining theoretical, historical, and contemporary aspects respectively. The structure reflects the central premise of the book, namely that perspectives on Taiwan’s contemporary language politics can only be understood in their historical contexts, and that these in toto can be best understood through building a theoretical framework that synthesizes both sociolinguistic and political sociological approaches. As such, the first section, which develops the theoretical foundations of a political sociology of language, complements the other two, which are both empirical in nature. The second section is organized as a broadly linear historical narrative, while the third section addresses the contemporary situation – i.e. post-martial law after 1987 – somewhat more thematically. A standalone seventh chapter provides a conclusion to the book.

Part I: Theoretical foundations

In the first part, chapter one defines the analytical terrain of the book by outlining working definitions of language, society, and the state. These single terms index vast fields that deploy a multitude of concepts and positions, and so defining – or at least delimiting – is a Sisyphean task that is a necessary but never sufficient means to orient readers of different disciplinary stripes as to the ways in which they are used in this book. The following chapter attempts to synthesize these more coherently, so the objective of chapter one is to keep these definitions relatively isolated from each other, and they are presented consecutively and somewhat parsimoniously. Nevertheless, their amorphous nature means that definitions are only ever partial and cannot be entirely prevented from existing in dialogue with each other. Language, therefore, is treated as a political, sociological, and cultural phenomenon, as opposed to investigating its structural or psychological dimensions. Keeping society and the state – the analytical terrain of political sociology – separate is an even more arduous task; as Poulantzas (1980: 600) notes, “according to whether we choose the state or society as the focal point of our research, our approach to the other term will necessarily be different”. Defining, or attempting to delimit, these key terms provides the foundations on which to build a theoretical framework of a political sociology of language.

Chapter two develops this framework, with an emphasis on a political sociology of language, and not a political sociology of language, which is to say that the concerns of political sociology – the relationships between society
and the state – are used as a framework to understand language, and that it is not, for various reasons, an attempt to advance an explicitly politicized version of a conventional sociology of language, or, that is, a political sociology of language. Put another way, the aim of this chapter is to view relations between society and the state as a sociolinguistic concern, and language as a concern for political sociology; the critical, ethical, and normative perspectives of the “social bases of politics” (Lipset 1959) and the political bases of society have, it is argued, sociolinguistic dimensions. Specifically, this chapter deals with language and the (modern) state in terms of the bureaucratic imperatives of language planning and policy (LPP); the relationships between language and colonization, nationalism, and globalization; the notion of language rights and transitional justice; and the ramifications for multilingualism when considering the democratizing potential of pluralist public spheres and civil society. In all of these areas, it is argued that LPP decisions are always contextualized by the given historical-structural paradigm in which a state is located, and that they are always complex calculations between administrative practicality and political ideology.

Part II: Historical contexts

The second part locates Taiwan’s language politics in their historical context. Chapter three begins by tracing the earliest recorded encounters, in the mid fourteenth century, between the Austronesian-speaking indigenous populations, who migrated from the Asian mainland to the island some six thousand years ago, and the Chinese. These contacts were to structure Taiwan’s “imagined geography” (Teng 2006) as a peripheral territorial that lay, for all practical purposes, beyond the frontiers of the Chinese empire. With the arrival of Dutch colonists in 1624, indigenous Taiwan becomes enmeshed in state (or state-like) structures and processes imposed from without. The political economy of merchant capitalism facilitated labour migration from China for the agricultural colony, thus transforming the island into a majority Sinitic-speaking (rather than Austronesian-speaking) territory, with language politics, and politics and society more broadly, being managed by what I refer to as the “missionary-colonial complex”. In this way, the linguistic resources and moral codes of the missionaries are leveraged for the colonial Dutch state’s political and economic rationales. The final part of this chapter examines Qing rule of the island between 1683 and 1895, drawing a distinction between earlier practices of socio-spatial and sociolinguistic differentiation imposed until around 1750, which served in part to shelter indigenous language and cultures from shift and death, and
assimilation processes afterwards, which accelerated the loss of linguistic diversity.

Chapter four deals with two periods of modern history, namely Japanese colonialism between 1895 and 1945, and the subsequent martial law period imposed by the KMT between 1949 and 1987. While Dutch colonization introduced the embryonic modern state, it came in more sophisticated form with the arrival of the Japanese, and the KMT finessed the technologies of statecraft even further. This chapter examines the continuities and discontinuities in colonial and authoritarian policies aimed at inculcating language shift among Taiwan’s inhabitants. It begins by contextualizing Japan’s internal socio-political and sociolinguistic reorganization during the Meiji Restoration from 1868, which dismantled a feudalist system with high internal dialect diversity and replaced it with a modern state that had a common language and script. This left Japan poised to experiment with becoming a colonial power, with Taiwan as its laboratory. Three main periods of colonial rule are identified, specifically the early years, and the subsequent doka and kominka programs, which differed in their approaches to sociolinguistic and cultural assimilation of different Taiwanese ethnolinguistic groups and social classes, depending on the exigencies of colonial and regional politics. KMT rule from 1945, at the conclusion of the second Sino-Japanese war, is then addressed, beginning with LPP on the Chinese mainland. From there, KMT language policies under the initial period of rule under Governor Chen Yi are examined, and then those after 1949 that successfully, if ruthlessly, spread Mandarin Chinese.

Part III: Contemporary perspectives

The third and final part focuses on the contemporary dynamics of language politics in Taiwan, particularly the period after the end of martial law in 1987 to the present day. Chapter five examines the politics of local languages, and the role of multilingual policies as a cornerstone of the transition to liberal democracy from martial law. Specifically, it begins by contextualizing democratic reform and political liberalization from the late 1970s, before assessing the role of language in democratization between 1987 and 2000, focusing in part on the use of local non-Mandarin languages in political campaigning. From there, DPP policies during their initial two-term tenure between 2000 and 2008 are analyzed, making the argument that the promotion of multilingualism was an adjunct to a form of cultural nationalism, or bentuhua, that has been an outlet for independence-oriented sentiment in the absence of an opportunity to assert full sovereignty. This section then turns to transitional justice dimensions of the ultimately
unsuccessful National Language Equality Law (NLEL) and National Language Development Law (NLDL), before using ethnographic and interview data from 2007 to investigate how political factors, including local and regional autonomy, socio-economic differentiation, and party-political organization, structured differentiated access to mother-tongue language education (MLTE) in schools. The final section of the chapter investigates what, if any, changes occurred under the return of the much reformed KMT, who ruled for two terms between 2008 and 2016, following Dupré (2017) in concluding that path dependencies laid down by DPP policies forced the KMT to continue to promote multilingualism alongside democratization, albeit less vigorously.

Chapter six examines the influence of the nexus of globalization, neoliberalism, and immigration on Taiwan’s sociolinguistic and socio-political situation. Two main themes are elaborated. The first is the phenomenon of English, the global language that comes laden with neo-imperialist and neoliberal baggage, thus threatening the egalitarian orientation towards democracy that the nationalist project of bentuhua rests on. The second theme considers the languages of the island’s newest immigrants – so-called foreign spouses and migrant workers, which must be included from the perspective of democratic multilingualism, but which do not fall neatly into the categories defined by the often-parochial impulses of bentuhua. The first half of the chapter examines stratified access to English, arguing that, in practice, socio-economic and geographical factors mean that despite the “English for all” mantra that has framed LPP, English remains a valuable capital available only to a few. In particular, it assesses the existence of a shadow private education sector that competes, in neoliberal fashion, with the official state-funded education system. The second half addresses foreign spouses and migrant workers, and the otherization of their languages in state discourse, the public sphere, and civil society more broadly. In particular, the “language problems” of foreign spouses are discussed in terms of how their resolution – often through the expectation of linguistic and cultural assimilation – is fundamental to how they are constructed as “good citizens” in the eyes of the state and as “good Taiwanese” in the eyes of civil society.

The book concludes with an epilogue that assesses the prognosis for multilingualism in Taiwan and the contributions that a political sociology of language may make to the study of language politics more broadly.