

Doctor of Philosophy Thesis in Oriental Studies

DUELLING IDENTITIES:
DIMENSIONS of DUAL IDENTITY in
CONTEMPORARY TAIWAN

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Abstract

The core of the thesis is, taking Chinese and Taiwanese identities in the contemporary Taiwanese society as cases, to discover how people perceive, formulate, and interact with identities. The research implements the grounded theory and in-depth interview research method, conducting 108 interviews in different regions of Taiwan from 2010 to 2013. The main argument is that identity in and of itself is merely a generic label, which does not cause emotions or behaviours—people know they are ascribed to certain categories, but they lack of motivations to take actions for the categorical groups. Only those identities articulated with ‘emotion- or value-oriented discourses’ can gain the capacity of provoking people’s feelings and mobilising people to act. My research identifies and gives explicit discussions on two types of emotion-oriented discourses—imagined nostalgia and ethical narrative (which is also a value-oriented discourse), and three kinds of value-oriented discourses. They are: (1) Ethical narrative sets moral values for its audience; (2) cultural hierarchy defines socio-cultural values in society; and (3) political ideology signifies core political values of its audience. By treating identity as emotion- or value-oriented discourse, the thesis challenges traditional stereotypes of Taiwanese and Chinese identities in the society—such as identifying as Taiwanese means desiring independence, or all *wai sheng ren* group would claim Chinese identity—and offers adequate theories to explain why it is not the case. The thesis emphasises that there is no determinant identity in the society, and it is possible for people to have a certain degree of free will choosing to accept or to reject the operation of an identity. The thesis takes critical views on identity politics, deeming it as a risky, double-edged sword in the contemporary politics, which should be carefully examined and substituted with another ideology capable to achieve political emancipation.

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Introduction

Chinese and Taiwanese Identities in Contemporary Taiwanese Society

Chinese and Taiwanese¹ identities have been the subject of fierce debate in Taiwan since the late 1970s, a time when the ruling Kuomintang party (KMT)² was facing a series of legitimacy challenges. On the one hand, internationally, the nation's name, *Zhonghua-minguo* (中華民國; the Republic of China, ROC), which had been brought to Taiwan by Chiang Kai-shek's regime in 1945,³ was gradually losing its claim to represent the only 'China'.⁴ On the other hand, domestically, the Chinese nationalism⁵ promoted by the KMT government to validate its exclusive authority had been seriously challenged by

¹ All studies mentioned in this thesis (including the thesis itself) used the Chinese words '中國' (*Zhongguo*), '中國人' (*Zhongguoren*), '臺灣' (*Taiwan*) and '臺灣人' (*Taiwanren*), rather than the English words 'China/Chinese' and 'Taiwan/Taiwanese' in their surveys. However, throughout this English thesis, I use the English words.

² The party is also translated as the Chinese Nationalist Party or Romanised as Guomindang (GMD) in some literature. In my text I sometimes equate the party with the ROC government of 1911–1999 and 2009–present, and I refer to the Democratic Progressive Party (DPP) as the government between 2000 and 2008, since these two parties are believed to be quite different in their nationalist aspirations and thus have a great capacity to influence social discourses and individuals' identities via national policies. Stressing the role of political party could help readers to understand the situation in a more comprehensible historical context.

³ Taiwan was ceded to Japan by the Qing Dynasty after the First Sino-Japanese War in 1885. The island experienced 50 years of Japanese colonial rule and in 1945 was taken back by the Republic of China (ROC), which had overthrown the Qing regime in 1911. The ROC government, led by the KMT, soon was defeated by the Chinese Communist Party (CCP) in the civil war, lost its control over Mainland China, and retreated in 1949 to Taiwan, where it has remained through the present.

⁴ Despite U.S. attempts to isolate it, the People's Republic of China (PRC) established by Mao Zedong (毛澤東) and the victorious Chinese communists won wide international recognition and, crucially, in 1971 was recognised by the United Nations as the only lawful representative of China and granted a permanent seat on the Security Council.

⁵ In this thesis, I simply define the concept of nationalism with three major components: (1) an imagining of a specific group or community in the name of 'nation'; (2) its members' fervent emotional attachment towards the group or community; and (3) its members' aspiration for the group or community to possess sovereignty (the power not only to govern its members but also to be recognised as representing them). For detailed discussion about nationalism, see Chapter 5. From this perspective, Chinese nationalism can be regarded first of all as a political aspiration of a group of people who hold the idea of Chinese nation with great passion and wish for this Chinese nation be united and realise its full sovereignty. The Chinese nationalism promoted by KMT must be distinguished from that promoted by the CCP and, in theory, should be identified as *Zhonghua-minguo* (ROC) nationalism. It has not only a different official name but also a different choice of political system and envisages a different path to modernity. ROC nationalism has as its goal the unification of the nation, to be achieved by recovering control of the mainland in the name of the Republic of China, and it places its faith in capitalism to lead the Chinese people to a prosperous future.

urgent demands for political reform in the society. Taiwanese consciousness, which could be framed as a particular attachment to the island of Taiwan, the birthplace of over 85 percent of the population, as well as a realistic appeal to refocus in both cultural and political terms on Taiwan rather than the Mainland, was thus brought into the forefront of discourse at that time.

In fact, Taiwanese consciousness at its first emergence, which is conventionally dated to the Debate on *Xiangtu* Literature (鄉土文學論戰; literally, ‘the debate on Native Literature’) during 1977 and 1978, was couched by its proponents within a framework that appeared compatible with Chinese nationalism.⁶ Affection for one’s hometown located within a Chinese nation—that is, the ROC—was presented as natural and not construed as a challenge to mainstream Chinese nationalism.⁷ All the same, the debate indeed suggested that these strong passions, which in retrospect seem to have contributed to the eruption of Taiwanese nationalism in the early 1980s, had long been a powerful force quiescent in Taiwanese society.

Not until the debate on Chinese versus Taiwanese emotional ties (*zhongguojie taiwanjie lunzhan* 中國結台灣結論戰) arose in 1982 were Taiwanese consciousness and identity pitted against the Chinese nationalism of the KMT.⁸ While commenting on the news that composer/singer Hou De-jian (侯德健), formerly regarded as patriotic, had ‘treacherously’ departed for the PRC,⁹ young singer Yang Zu-jun (楊祖珺)¹⁰ and Lin Shi-

⁶ For details of this debate, refer to the works of A-chin Hsiao, ‘The Indigenization of Taiwanese Literature: Historical Narrative, Strategic Essentialism, and State Violence’. In *Cultural, Ethnic, and Political Nationalism in Contemporary Taiwan*, edited by John Makeham & A-chin Hsiao (New York: Palgrave Macmillan, 2005), 125–55.

⁷ Ibid., 132–4.

⁸ The work of J. Bruce Jacobs provides extensive details of this debate. Jacobs, “‘Taiwanization’ in Taiwan’s Politics”, *Cultural, Ethnic, and Political Nationalism in Contemporary Taiwan*, edited by John Makeham & A-chin Hsiao (New York: Palgrave Macmillan, 2005), 17–54.

⁹ Hou was the author of the very popular patriotic song, *Long-de-chuanren* (龍的傳人—literally, ‘Inheritor of the Dragon’), which expresses a strong passion for China and for being Chinese. The first line of the song is, ‘In the far East hides a dragon named China’. Hou’s betrayal leave for China caused great impact in Taiwanese society because it seemed to suggest that the ‘China’ his song referred to was the PRC

min (林世民)¹¹ both remarked stridently on the Chinese nationalist aspiration of the KMT—i.e. to save a billion compatriots and re-establish a great Chinese nation by regaining the lost mainland territory. They conceived this impractical goal would eventually drive the new generation either to espouse Taiwan independence or to go to the Mainland to embrace the real Chinese nation. On the other side, native-born and socialist-inspired writer Chen Ying-zhen (陳映真) wrote a note that opposed Yang’s and Lin’s criticisms of Chinese nationalism. He criticised their views as constituting a form of Taiwanese consciousness, which he denounced as naïve and myopic.¹² Moreover, he argued that the dispute over Chinese versus Taiwanese emotional ties has nothing to do with the provincial-origin (*shengji* 省籍) conflict in Taiwanese society, believing that although people in Taiwan may have different provincial origins and use different dialects, they all possess particular attachments to and shared common historical memories of China.

The provincial-origin distinction that Chen Ying-zhen mentioned in his note was a demographic classification based on birth province that was used officially in Taiwan prior to 1992. The conflict of provincial-origin refers to the long clash between the two ethnic groups: *waishengren* and *benshengren* in Taiwanese society.¹³ The generic concept of *waishengren* (外省人; literally, ‘people from other provinces’) collectively refers to people who came to Taiwan after 1945 (the year the Chinese KMT government took over

rather than the ROC, which was a slap in the face of the KMT government which had been struggling to assert its legitimacy as the sole representative of the one true China.

¹⁰ Yang Zu-jun, ‘Julong julong ni xia le yan’ (‘Dragon! Dragon! Blind Dragon!’), *Qianjin-zhoukan* 11, (June 1982), 16–18.

¹¹ Lin Shi-min, ‘Long meiyou chuan yifu’ (‘Dragon without Clothes?’), *Qianjin-zhoukan* 12, (June 1982), 14–15.

¹² Chen Ying-zhen, ‘Xiang zhe geng kuanguang de lishi shiye’ (‘Towards a Broaden Field of Historic View’), *Qianjin-zhoukan* 12, (June 1982), 12–13.

¹³ Today, the conventional scheme of ethnic classification in Taiwan refers to the categories of *Sidazuqun* (四大族群, literally, the national scheme of ethnic classification in Taiwan refers to the categories of *Sidazuqun* people in Taiwan into four groups: Taiwanese aboriginals, *waishengren*, Hoklo, and Hakka. See note 14 and Wang Fu-chang’s *Ethnic Imagination in Contemporary Taiwan* (Taipei: Socio Publishing Co. Ltd: 2003) for additional relevant information.

Taiwan from Japan) and their descendants. They mainly used Mandarin as a common language to communicate with each other, regardless of their various original provincial languages/dialects. *Benshengren* (本省人; literally, ‘this province’ or ‘local province’) refers to people whose (patrilineal) forefathers had been in Taiwan prior to 1945. Today, the *benshengren* are further classified into two ethnic subgroups, Hoklo (河洛; also known as *Minnan-ren* 閩南人, i.e., people from the South of Fujian) and Hakka (客家),¹⁴ according to the languages they speak. Regardless of the conventional interpretation that attributes the provincial-origin conflict to differences in spoken language, life style, historic experience, and even in access to bundles of social resources, Chen Ying-zhen denied that *waisheng-bensheng* conflict existed. He also denied that social conflicts in Taiwan could be explained in terms of ‘Chinese-Taiwanese’ tensions. Rather, he viewed the social conflicts in Taiwan as a class struggle in Taiwan.

Chen’s note reveals complicated but close relationships between the Chinese and Taiwanese identities and the provincial-origin conflict. Indeed, some Taiwanese people, even political elites, did equate the differentiation between *Zhongguoren* (Chinese) and *Taiwanren* (Taiwanese) with the *waishengren/benshengren* division. People possessing Taiwanese identity were liable to be viciously denigrated as uneducated and easily-manipulated village bumpkins—or as narrowed-minded separatists, insurrectionists against the Chinese motherland, that is to say, Taiwanese independence advocates. Conversely, people with Chinese identity could be denigrated as authoritarian *waishengren* elites with vested interests, or as unificationists, fellow-travelers of the Chinese Communist Party, or traitors to Taiwan. By the mid-1980s, even before the two-party

¹⁴ Hakka is one of the four major ethnic groups in Taiwan. Most of its members reside in Taoyuan, Hsinchu, Pingtung and Taitung counties. They have particular customs that are distinct from Hoklo, and they speak the Hakka language, which is different from the Mandarin and Taiwanese languages (the latter being Taiyu, also known as *Minnan-bua*, the language used by the *Minnan-ren* [Hoklo]). This linguistic diversity has been considerably reduced since the KMT government has been promoting Mandarin as the official national language for years.

system was officially established in Taiwan, the division between Chinese and Taiwanese identities was already being exploited for political gain in the limited local elections that were allowed. Appeals such as ‘*Taiwanren tou Taiwanren*’ (literally, ‘Taiwanese vote for Taiwanese’) are whispered on the street during elections to this day, conveying the message that *benshengren* should vote only for *benshengren* candidates. The identity campaign was so effective in the 1980s elections that it was probably what led President Chiang Ching-kuo (蔣經國; son of Chiang Kai-shek) to stand up and make the statement ‘I am a Taiwanese, too’ in 1987.¹⁵

In addition to the influence on elections in Taiwanese society which has been ongoing into the present,¹⁶ the strife over Chinese and Taiwanese identities also spilled over from national policies to international relations. With respect to the former, when two native-born Taiwanese (*benshengren*), Lee Teng-hui and Chen Shui-bian, seized political power, they carried out various reforms such as excluding the mainland from the depiction of ROC territory on newly printed maps, putting images that showed features of Taiwan on the new banknotes,¹⁷ substituting ‘Taiwan’ for ‘China’ in the official names

¹⁵ See the work of Bruce Jacobs, “‘Taiwanization’ in Taiwan’s Politics.’ In *Cultural, Ethnic, and Political Nationalism in Contemporary Taiwan*, edited by John Makeham & A-chin Hsiao (New York: Palgrave Macmillan, 2005), 17–54; and the work of Wu Yu-shan, ‘The Evolution of the KMT’s Stance on the One China Principle: National Identity in Flux’. In *Taiwanese Identity in the Twenty-first Century: Domestic, Regional, and Global Perspectives*, edited by Gunter Schubert & Jens Damm (New York: Routledge, 2011), 51–71.

¹⁶ The 1994 Taipei mayoral election offered one of the most conspicuous examples. In a televised debate, Chao Shao-kang (趙少康), the candidate of the New Party (a party representing Chinese nationalism that had branched off from the KMT, which it saw as too compromised by dirty local Taiwanese politics), proclaimed that the election was indeed a battle between Zhonghua-minguo (ROC) and Taiwan independence and accused his opponent, the Democratic Progressive Party (DPP) candidate Chen Shui-bian (陳水扁), of disrespecting the country and manipulating the provincial-origin conflict (the video clip of this debate is available online: See http://youtu.be/TB1_SA_4NRc). Four years later, in the next Taipei mayoral election, the conflict between Chinese and Taiwanese identities was once again brought to the surface, compelling then KMT president Lee Teng-hui (李登輝) to endorse candidate Ma Ying-jeou (馬英九), calling him a *xin-Taiwanren* (新臺灣人; literally, ‘New Taiwanese’), and asking voters to support Ma in spite of his being *waishengren*. Lee’s appeal on Ma’s behalf was effective because Lee, as Taiwan’s first native-born president, held the status of a venerated political icon in the eyes of Taiwanese nationalists.

¹⁷ Stéphane Corcuff, ‘The symbolic dimension of democratization and the transition of national identity under Lee Teng-hui’, *Memories of the Future: National Identity Issues and the Search for a New Taiwan* (London and New York: M.E. Sharpe, 2002), 73–101.

of some national institutions',¹⁸ inscribing the word 'Taiwan' on the cover of passports, declaring new national holidays,¹⁹ revising school textbooks so that they no longer implied that Taiwan and mainland China were the same country, and decreasing the proportion of the school curriculum devoted to studying Classical Chinese (文言文).²⁰ These policies were deemed to encourage the development of Taiwanese identity, and aimed at 'desinicisation'—that is, the cultural and symbolic eradication of any connection to China. Some of these measures were reversed when Ma's (KMT) administration returned to power in 2008.²¹

With respect to international relations, China (PRC) has influenced the formation of the strife over Chinese and Taiwanese identities. China (PRC) is a rising super power that has based part of its legitimacy on its claim to be the sole Chinese nation in the world. China's actions have posed a threat to Taiwan in various ways, including: claiming Taiwan is part of China, never renouncing the option of 're-taking' Taiwan by force, keeping missiles pointed at Taiwan, and seeking to prevent Taiwan's participation in international bodies and events. These hostile actions have inevitably affected the

¹⁸ Chen had managed to change the names of diplomatic offices in foreign countries and of state-run firms in accordance with his terms. In 2007, for example, Chinese Petroleum Corp (CPC, 中國石油) was renamed CPC Corp, Taiwan (臺灣中油), China Shipbuilding Corp (CSBC, 中國造船) was changed to 'CSBC Corp, Taiwan (臺灣國際造船), and Chunghwa Post Co (中華郵政) to Taiwan Post Co (臺灣郵政). The change from the Overseas Chinese Affairs Commission (OCAC) to Overseas Compatriots' Affairs Commission (OCAC) is another example; see Jens Damm, 'From 'Overseas Chinese' to 'Overseas Taiwanese: Questions of Identity and Belonging', *Taiwanese Identity in the Twenty-first Century*, edited by Gunter Schubert & Jens Damm (New York: Routledge, 2011), 218–236.

¹⁹ For instance in 1995, February 28th was set as a national holiday as a memorial to the 228 Incident (or 228 Massacre). The Incident was a large-scale resistance of people against the KMT government occurring in late February 1947, which was conventionally deemed as the most violent provincial-origin conflict in Taiwan. The incident ended up in sanguinary oppression by the KMT government. See Robert Edmondson, 'The February 28 Incident and National Identity'. In *Memories of the Future*, edited by Corcuff, Stéphane (London and New York: M.E. Sharpe, 2002), 25–46, and Edward Vickers, 'Frontiers of Memory: Conflict, Imperialism, and Official Histories in the Formation of Post-Cold War Taiwan Identity'. In *Ruptured Histories: War, Memory, and the Post-Cold War in Asia*, edited by Sheila Miyoshi Jager and Rana Mitter (Harvard University Press, 2007), 192–208, for more detailed discussion.

²⁰ For more discussions on the 'de-sinicisation' policies in Lee's and Chen's administrations, see Huang Guang-guo, *Taiwanese Identity and Democracy: The Social Psychology of Taiwan's 2004 Elections* (New York: Palgrave Macmillan, 2006), 11–14; and Hao Zhi-dong, 'Imagining Taiwan (2): De-Sinicization under Lee and Chen and the Role of Intellectuals', *Whither Taiwan and Mainland China: National Identity, the State, and Intellectuals* (Hong Kong: Hong Kong University Press, 2010), 50–75.

²¹ For example, Taiwan Post Co was changed back to Chunghwa Post Co. in July 2008.

Taiwanese people's perception of China with implications for their Chinese and Taiwanese identities.²²

Today, issues surrounding Chinese and Taiwanese identities can still strike a political nerve in Taiwanese society.²³ Two television advertisements presented by the KMT in the 2011 presidential election used the ROC's national flag as their main motif, invoking the ROC *Zhonghua-minguo* nationalist discourse to mobilise supporters.²⁴ Another advertisement emphasised the Ma administration's achievements in promoting study of the *Sishu-wujing* (四書五經; the 'Four Books and Five Classics'), by which it suggested the KMT was a successful guardian and the orthodox inheritor of authentic Chinese culture. A campaign advertisement for the presidential candidate of the Democratic Progressive Party (DPP), Tsai Ing-wen 蔡英文, also brought up the sensitive debate over Taiwanese identity. Her declaration at the end of the ad, 'Taiwan must embrace the world. I am *Taiwanren* [Taiwanese]. I am Tsai Ing-wen (臺灣必須走向世界。我是臺灣人，我是蔡英文)' angered some KMT supporters (and others opposed to the DPP). The latter accused Tsai and her party of manipulating the 'ethnic' issue and creating a 'Taiwanese/non-Taiwanese divide' in society.²⁵ The most recent

²² A particularly negative impression was made when China responded to Taiwan's first direct presidential election in 1996 by launching missiles to the Taiwan Strait under the pretext of a routine military manoeuvre. My participants whose Chinese and Taiwanese identities are influenced by these negative images of China are further presented and discussed in Chapter 3.

²³ Three chapters in Peter C.Y. Chow's (ed.) book, *National Identity and Economic Interest: Taiwan's Competing Options and Their Implication for Regional Stability* (Basingstoke: Palgrave Macmillan, 2012) offer explicit depiction about the identity development since 2008 in Taiwan; they are: Michael Danielsen's 'On the Road to a Common Taiwan Identity', Frank Muyard's 'Taiwanese National Identity, Cross-Strait Economic Interaction, and the Integration Paradigm', and Wu Naiteh's 'Will Economic Integration Lead to Political Assimilation?'. Generally in their observations, the number of Taiwanese people claiming Taiwanese identity has increased since 2008, regardless the KMT government's promotion of Chinese nationalism and the further economic integration between Taiwan and China.

²⁴ Ma's 2011 presidential election advertisements: 'National Flag Anthem' (<http://youtu.be/Qte8wHLY-WI>); 'Loving National Flag' (<http://youtu.be/tpGGgqQmaBE>); 'Studying Sishu-wujing' (<http://youtu.be/63fTZ3i8knI>).

²⁵ For instance, an article by Wu'er Kaixi (吾爾開希) accused Tsai's advertisement of trying to manipulate the 'ethnic issue'. Wu'er Kaixi, 'Bufang taolun yixia 'taiwanren' de dingyi' ('How about Discussing the Definition of "Taiwanese?")', *Apple Daily*, June 28·2011, http://tw.nextmedia.com/applenews/article/art_id/33488928/IssueID/20110628. A reader's letter in the *Liberty Times* on July 10, 2011, titled 'Tan Tsai Ing-wen aima' ('Talking about Tsai Ing-wen Being

uproar of this type occurred around the comments of Hau Long-bin (郝龍斌), the current mayor of Taipei City (also a KMT member) when he visited Beijing on 29 June 2014. Referring to the history of the First Sino-Japanese War, he stated that the severance of Taiwan from China had caused serious harm to the Taiwanese people. People in Taiwan had felt abandoned by their mother country; ever since then, they had been orphans. His words led to various attacks from the opposing camp. Several DPP councilors of Taipei City reproached Hau for degrading Taiwan's sovereignty and 'kissing China's ass'.²⁶

Chinese/Taiwanese: National identity? Ethnic Identity? Cultural Identity?

From this brief summary of historical developments, we see not only the constant significant influence of Chinese and Taiwanese identities on Taiwan's politics and society, but also a tendency in Taiwanese society to treat Chinese and Taiwanese identities as two discrete and unique entities that are in opposition to one another. However, a series of studies based on annual surveys conducted by the Election Study Centre at National Chengchi University seem not to share this perspective. The surveys indicated that in 1992, 17.6 percent of respondents regarded themselves as Taiwanese only, and 25.2 percent as Chinese only, while 45.4 percent of respondents possessed a 'dual identity', identifying as both Chinese and Taiwanese. By 2014, the percentage of respondents who regarded themselves as 'only Taiwanese' had increased to 60.4 percent, while those who identified as 'only Chinese' had dropped to 3.5 percent; the number with a perceived dual

Denounced'), tries to defend Tsai against the accusation (<http://news.ltn.com.tw/news/opinion/paper/507335>).

²⁶ Anchia Kuo and Huichin Lin, 'Hau-longbin fang Beijing zuguo paoqishuo aihong ('Hau Reproached for "Abandonment of Mother Country" Statements Made When Visiting Beijing'), *Liberty Times*, June 30, 2014, <http://news.ltn.com.tw/news/focus/paper/791854>.

identity had decreased to 32.7 percent.²⁷ Clearly, approximately one third of Taiwanese conceive of the Chinese and Taiwanese identities as not being in conflict but, rather, being capable of co-existing in one person.

The fact that many Taiwanese people embrace a dual identity suggests that in Taiwan, neither Chinese identity nor Taiwanese identity are national identities in a conventional sense. According to Ernest Gellner, national identity is ‘the principle that the political and the national unit should be congruent’²⁸ Meanwhile, according to Antony Smith, national identity is one of the principal goals of nationalist movements, the other two being national autonomy and national unity. However, if national identity is to be defined and discussed on the basis of an exclusive national allegiance, then Chinese and Taiwanese identities obviously cannot be forced into this category of identity. Indeed, Taiwanese people’s Chinese or Taiwanese identity is relatively unconstrained by their preference for Taiwan’s future. An individual who identifies as Chinese would not necessarily support unification with the PRC (for the ‘Greater Chinese nation’). Nor would one professing a Taiwanese identity be certain to support Taiwanese independence (for the ‘Taiwanese nation’). As Shelley Rigger suggests, the Chinese/Taiwanese identity and preference for unification and independence do ‘not fit together neatly in a package labeled “national identity”’.²⁹

To resolve this dilemma, scholars have tried to differentiate between national identity and the Chinese/Taiwanese identity and, in doing so, have developed two different approaches. One attempts to retain national identity as a valid indicator of national allegiance and applies the concept to Taiwan’s particular context by strictly

²⁷ The statistic data can be seen at <http://esc.nccu.edu.tw/modules/tinyd2/content/TaiwanChineseID.htm>.

²⁸ Ernest Gellner, *Nations and Nationalism* (Malden, Mass: Blackwell, 1983).

²⁹ Shelly Rigger, *Taiwan's Rising Rationalism: Generations, Politics, and 'Taiwanese Nationalism'* (Washington D.C.: East-West Center Washington, 2006), 22. Further, citing Shyu Huo-yan’s 1994 study, Rigger comments: ‘[t]he share of respondents calling themselves Taiwanese was rising (from 13 percent in 1991 to 17 percent in 1993), but the share of respondents who either supported or opposed both independence and unification was also rising—from 44 percent to 52 percent over the same period’ (ibid., 21).

defining national identity as a person's preference for Taiwanese independence or Chinese unification, while regarding the professed Chinese or Taiwanese identity as an 'ethnic identity'. Research adopting this approach, such as that of Wu Nai-teh,³⁰ Chen Wen-chun,³¹ Robert Marsh,³² and Andy Chang and T.Y. Wang,³³ has produced abundant statistical data to delineate the ethnic identities (Chinese versus Taiwanese) in Taiwanese society. Nevertheless, despite having presented a wealth of demographic information and statistical data describing relationships between Chinese and Taiwanese identity and

³⁰ Believing that people's chosen visions of Taiwan's future were influenced both by emotional attachments and pragmatic considerations, Wu Nai-the, 'Shengji yishi, zhengzhi jichi he guojia rentong' ('The Provincial Conscience, Political Support, and National Identity'), in *Zugun guonxi yu guojia rentong* (*Ethnic Relations and National Identity*), edited by Mau-kuei Chang (Taipei: Yeqiang, 1993), 27–51, distinguished more precisely between the two ideas: 'national identity' referred to their emotion-based preference for their country, while 'national choice' involved a rational selection. He aimed to probe the authentic 'national identity' of people in Taiwan with the following two survey questions: (1) 'Some people say, 'If Taiwan could maintain peaceful relations with the Chinese communists after declaring independence, then Taiwan should become independent and establish a new country.' Do you support this way of thinking?' and (2) 'Some people say, 'If Taiwan and the mainland were comparable in their economic, social and political conditions, then the two sides should be unified.' Do you support this way of thinking?' Wu presumes that supporting one of these options while rejecting the other should be a kind of 'national identifier' indicative of the subject's strong emotional attachments to either nation (China or Taiwan). More specifically, Wu labels the person opposing unification (statement 2) and supporting Taiwan independence (statement 1), even when the possible outcome of peaceful merger was proposed, as a 'Taiwan nation identifier' (9.3% of his respondents); and one opposing Taiwan independence (statement 1) and supporting unification (statement 2) as a 'China nation identifier' (38% of respondents); one able to accept both solutions as a 'nation selector' (25% of respondents); and one opposing both options as a 'conservative'.

³¹ Chen Wen-chun's research, *Taiwan de zuqun zhengzhi* (*The Ethnic Politics in Taiwan*) (Hong Kong: Hong Kong Social Science Press, 1997), found that in 1993, 45.5 percent of his respondents had dual identity, and also that this dual identity tended to be correlated with higher education levels and younger age.

³² See: Robert Marsh, 'National Identity and Ethnic Identity in Taiwan: Some Trends in the 1990s', in *Memories of the Future: National Identity Issues and the Search for a New Taiwan*, edited by Stéphane Corcuff (London and New York: M.E. Sharpe, 2005), 144–59. Marsh's concept of 'national identification' was the refined version of preference for unification of independence developed by Wu Nai-the (1993). Marsh defines Chinese/Taiwanese identity as 'subjective ethnicity' (also 'ethnic consciousness' or 'ethnic self-identification'), which is different from bureaucratically defined 'ethnic identity' (provincial origin). By reviewing Taiwan presidential election surveys, Marsh found that subjective ethnic identity was a better indicator of national identification (the preference for independence or unification) than was the bureaucratically defined ethnic identity. His research also indicates that ethnic self-identification (Taiwanese, Chinese, or both) 'has the strongest relationship to national identification, followed by bureaucratically defined ethnicity, education, and marital status' (Marsh 2005: 151). Other factors, including age, gender, number of wage earners in the individual's household, household income, and social class identification had no significant correlation with national identification.

³³ Chang and Wang in their work, 'Taiwanese or Chinese? Independence or Unification? An Analysis of Generational Differences in Taiwan'. *Journal of Asian and African Studies* 40, no. 1–2 (April 2005), 29–49, took age into further consideration. In their research they found that: (1) the number of respondents with dual identity and those with Taiwanese identity was increasing annually (within all the generations); (2) respondents of younger generation were more inclined to hold dual identity and to express support for maintaining the status quo of the cross-strait relations; (3) Taiwanese identity and education had a significant negative correlation; (4) more *benshengren* respondents than *waishengren* tended to profess Taiwanese identity and dual identity.

other variables, the research in this vein has failed to provide a complete picture of these identities. This is mainly because, when configuring Chinese or Taiwanese identity into an operational variable, these studies simply class it as an ethnic identity without adequately explaining why it should be considered as such: Is it based on the ‘objective’ fact that Taiwanese and Chinese people have different ancestry?³⁴ Or is it based on the average Taiwanese person’s ‘subjective’ belief that he or she is ethnically not Chinese? Referring to the Chinese or Taiwanese identity as an ethnic identity is problematic and contentious, since ethnic groups in Taiwanese society are conventionally designated according to provincial origin—in line with *waishengren* and *benshengren*. For that matter, the relationship between ethnic identity (provincial origin) and Chinese/Taiwanese identity is also debatable. As Lin Chia-lung has explicitly explained:³⁵

[A]lthough there is a high correlation between the two, one should not equate ethnic identity [provincial origin] with national identity [Chinese/Taiwanese identity]. In other words, not all Mainlanders lack Taiwanese consciousness and not all native Taiwanese embrace Taiwanese identity. In addition, we should also be aware that the terms “Taiwanese” and “Chinese” may have different meanings for different people and may change their meanings when the contexts change.³⁶

The terminological ambiguity has resulted not only from the attempt to consign Chinese and Taiwanese identities to a specific category but also from the porous nature of the ethnicity/nation categories. Siniša Malešević observes that all the definitions of

³⁴ Some researchers and Taiwanese nationalists argue that because Taiwanese aboriginals are actually of Austronesian lineage, and there have been hundreds of years of mixing and intermarriage, today’s native-born Taiwanese are ethnically different from the Mainlanders (Chinese). See the work of Robert Blust, ‘The Prehistory of the Austronesian-Speaking Peoples: A View from Language’, *Journal of World Prehistory* 9, no. 4 (December 1995), 453–510; Terry Melton, et al., ‘Genetic Evidence for the Proto-Austronesian Homeland in Asia: mtDNA and Nuclear DNA Variation in Taiwanese Aboriginal Tribes’, *The American Journal of Human Genetics* 63, no. 6 (December 1998), 1807–1823; Michael Stainton, ‘The politics of Taiwan aboriginal origins’. In *Taiwan: A New History*, edited by Murray A. Rubinstein (New York: M.E. Sharpe, 1999), 27–44; Cristian Capelli, et al., ‘A Predominantly Indigenous Paternal Heritage for the Austronesian-speaking Peoples of Insular Southeast Asia and Oceania’, *The American Journal of Human Genetics* 68, no. 2 (February 2001), 432–443.

³⁵ Lin Chia-lung, ‘The Political Formation of Taiwanese Nationalism’. In *Memories of the Future*, edited by Stéphane Corcuff (London and New York: M.E. Sharpe: 2002), 219–41. Also, in his book, *Taiwanese Identity and Democracy: The Social Psychology of Taiwan’s 2004 Elections* (New York: Palgrave Macmillan, 2006), 9, Huang Guang-guo also raises this concern for the confusion of national identity and provincial-origin identity in Taiwan.

³⁶ Lin Chia-lung, ‘The Political Formation of Taiwanese Nationalism’, 224.

‘ethnicity’, ‘nation’, and even ‘identity’ are too vague and problematic to produce significant analytical value.³⁷ With the definition of ‘ethnicity’ still unsettled in the context of Taiwanese society, applying the concept to the examination of Chinese and Taiwanese identities has created more confusion.³⁸ In short, as Chen Mu-ming has indicated, Taiwan scholars studying national identity have been hindered by a plague of vague definitions and poor clarification of the following concepts: national identity, ethnic identity, the preference for independence/unification, and the Chinese/Taiwanese identity.³⁹

The other main approach seeks to avoid this terminological predicament, and to surmount the obstacles imposed by the ambiguity of the terms ‘ethnicity’ and ‘nation’, by focusing instead on the meanings of Chinese and Taiwanese identities. Research by Liu I-chou⁴⁰ and Wu Yu-shan,⁴¹ for example, took into account concepts from a social psychological perspective, such as belongingness and group-membership. These two pieces of research indicate that ‘China’ is a geographical and ethnic concept comprising

³⁷ Siniša Malešević, *Identity as Ideology: Understanding Ethnicity and Nationalism* (Basingstoke: Palgrave Macmillan: 2006), 23–30.

³⁸ The title of one section in Chen Wen-chun’s *The Ethnic Politics in Taiwan* provides a bewildering example: It contains the phrase ‘Extremely significant differences in ethnic identity among different ethnic groups’, whereby the former ‘ethnic identity’ means Chinese/Taiwanese identity but the latter ‘ethnic groups’ refers to the classifications of *waishengren*, *benshengren*, and Hakka (ibid., 90). Huang Chi in her work ‘Dimensions of Taiwanese/Chinese Identity and National Identity in Taiwan’, *Journal of Asian and African Studies* 40, no. 1–2 (April 2005): 51–70, on the other hand, paid heed to his wording when attempting to take the ‘so-called objective measure’ of ethnic identity (that is, respondents’ fathers’ provincial origins) into account. By processing data obtained from the 2001 Taiwan Election and Democratization Study Survey, he concluded that these three concepts, ‘national identity’ (the preference for independence/unification), ‘ethnicity’ (provincial origin), and the Chinese/Taiwanese identity, can and should be regarded as three different analytical variables. The lingering problem, then, is that having detached the Chinese/Taiwanese identity from the ideas of national identity and ethnic identity, Huang eventually left the definition of Chinese/Taiwanese identity unresolved.

³⁹ Chen Mu-ming, ‘Taiwan guojia ren tong yanjiu de xiankuang yu zhanwang’ (‘National Identity Studies in Taiwan: The Present and the Future’), 2006: <http://www.tisanet.org/Activity/20060610/conference/1-2.pdf>

⁴⁰ Liu’s investigation showed that half of his respondents thought ‘China’ included both the mainland and Taiwan, and 70 percent thought ‘the Chinese people’ included both mainland and Taiwan residents; however, 75 percent believed that only Taiwan residents had the right to decide Taiwan’s future. See Liu I-chou, ‘Taiwan minzhong de guojia rentong—yige xin de celiang fangshi’ (‘National Identity of Taiwanese People—A New Study Method’), paper presented to the 1998 Annual Conference of the ROC Political Science Association (1998), 8–9.

⁴¹ Wu’s findings were similar: about half of his participants perceived the terms ‘China’ and ‘Chinese people’ to include both the mainland and Taiwan. Nonetheless, 80 percent of them thought that the terms ‘our country’ and ‘the people of our country’ referred to Taiwan only. See Wu Yu-shan, ‘Liangyan guanxi zhong de Zhongguo yishi yu Taiwan yishi’ (‘Chinese Conscience and Taiwanese Conscience in the Cross-strait Relationship’), *Zhongguo Shimu (China Affairs Quarterly)* 4 (April 2001): 83.

both the mainland and Taiwan, whereas ‘Taiwan’ is a term that correlates more to a nation or political entity. Lin Chia-lung’s work also explicitly examines the meanings of ‘Chinese’ and ‘Taiwanese’ in Taiwan.⁴² He concludes that ‘people tend to define ‘Taiwanese’ with territorial/political and subjective/psychological criteria and ‘Chinese’ with primordial/cultural criteria’. He proposes a solution: ‘[o]ne way to reconcile the differences between the two identities and minimize their potential conflicts is for one to treat his or her Chinese identity as a cultural expression (*huaren*) or an ethnic origin (*hanren*) and to treat his or her Taiwanese identity as a political identity’.⁴³

Following in this vein, several researchers incorporated the culture factor in their analyses. Lee Mei-chin’s study indicated that those participants identifying themselves as Taiwanese had less pride in, and affection for, China than those identifying themselves as Chinese.⁴⁴ Huang Li-li and her colleagues’ research also found that the respondents professing Chinese identity tended to have more positive impressions of Chinese culture, more optimistic views on cross-strait relations, and a greater preference for Mandarin.⁴⁵ They also tended to feel proud when mainland Chinese performed well in an international competition, and regarded symbols or items containing Chinese elements as most representative of their own culture. Similarly, her findings show that Taiwanese

⁴² Having reviewed a mass of data gathered through a telephone survey conducted by the *Great View* (遠見) magazine in 1996, Lin notes that 55 percent of respondents, when asked what is meant by Taiwanese-ness, related it to someone having been born or residing in Taiwan, 55 percent took it to mean those with a strong sense of Taiwanese consciousness, and 38 percent described it as being someone who self-identified as Taiwanese.⁴² Further, in his interviews with sixty-six legislators in 1995 and 1996, Lin found that if asked what was meant by Chineseness, 32 percent of these elite respondents related it to the concept of *huaren* (persons with a common Chinese historical or cultural background), 26 percent to holding PRC citizenship, and 20 percent to the concept of *hanren* (having common Chinese blood and lineage). See Lin Chia-lung, ‘The Political Formation of Taiwanese Nationalism’.

⁴³ *Ibid.*, 226.

⁴⁴ In the research Lee showed her participants two emotionally provocative video clips edited from the two films—*River Elegy* (河殤), a television documentary on the decline of traditional Chinese culture produced by CCTV and aired in 1988, and *The Great Yellow River* (大黃河), a documentary made by Japan Broadcasting Corporation (NHK) in 1986. Lee edited its sixth episode as her research material—to assess the participants’ pride in and affection for the term ‘China’. See Lee, Mei-chih. 2003. ‘Taiwan diqu zuqun yu guozu rentong de xianxing yu yinxing yishi’ (‘Explicit and Implicit Consciousness of Taiwanese Ethnic and National Identity’). *Indigenous Psychological Research in Chinese Societies*, 20 (December 2003), 39–71.

⁴⁵ Huang Li-li, James H. Liu, and Manling Chang, ‘The “double identity” of Taiwanese Chinese: A Dilemma of Politics and Culture Rooted in History’. *Asian Journal of Social Psychology* 7, no. 2 (August 2004), 149–68.

identity was the main predictor of attitudes on cultural issues to do with Taiwan.⁴⁶ Huang's research in 2007 further showed that the respondents who claimed dual identity and prioritised the Chinese aspect of their dual identity tended to have a 'Great-China ideology' (the idea that all people living on the mainland and in Taiwan have a common ancestry and share a common culture), supported the KMT's legitimacy, favoured unification with China, and had a 'collective self-esteem' in being both Chinese and Taiwanese.⁴⁷ Conversely, the respondents identifying themselves as Taiwanese only were more likely to manifest positive attitudes and affection towards Taiwan, support multiculturalism and ethnic secessionism, favour Taiwan independence, and have a collective self-esteem in being Taiwanese.

Once again, although providing much data, research following this approach offers only limited insights into Chinese and Taiwanese identities in Taiwan. This is because this model simply attempts to consign Chinese/Taiwanese identity to another problematic category—namely, culture. As Paul Graves-Brown and his colleagues (1996) describe in their critical assessment, *Cultural Identity and Archaeology*, the concept of 'culture' actually evolved and was re-shaped in the modern era in response to the development of the idea of 'nation':⁴⁸ Since the seventeenth and eighteenth centuries, the term 'culture' had been used frequently as a synonym for 'nation', but in the late twentieth century, with 'nationalism no longer based on the concept of national sovereignty, but on the essential character of particular human groups',⁴⁹ Graves-Brown et al observed that 'culture' had 'almost completely supplanted the terms "nation" and

⁴⁶ Ibid.; 165.

⁴⁷ Huang Li-li, 'M xing zhengdang vs. zhongxing yishi—Taiwan guozu rentong zhi yishi xingtai ji qi xinli jichu (M Shape vs. Bell Shape: The Ideology of National Identity and Its Psychological Basis in Taiwan)'. *Chinese Journal of Psychology* 49, no. 4 (December 2007), 451–470.

⁴⁸ Paul Graves-Brown et al., *Cultural Identity and Archaeology: The Construction of European Communities* (London: Routledge, 1996).

⁴⁹ Ibid., 54.

“civilization” in archaeology’.⁵⁰ Like identity, ethnicity and nation, the concept of ‘culture’ is often ambiguous and indeterminate; thus, explaining Chinese/Taiwanese identity as a form of cultural identity is no more useful than treating it as a form of national or ethnic identity. Both approaches lead to fruitless tautology. We may conclude that Chinese identity is the source of one’s Chinese cultural expression/attachment⁵¹ or the predictor of one’s affinity for Chinese culture,⁵² but the problem remains as to what this ‘Chinese’ culture is: What are its characteristics that cause these respondents to attach to it? Why do these respondents attach to Chinese culture rather than Taiwanese culture, if there is such a thing?

Shih Cheng-feng offers an analysis that can be regarded as the common conclusion of most past research on Chinese and Taiwanese identities.⁵³ With the belief that these two identities are at odds with each other, making it impossible to be simultaneously loyal to two rival political factions, Shih rejects the approach that treats both Chinese and Taiwanese identity simply as national (state) identities. He suggests that dual identity can only exist in the form of a hierarchical relationship: one (ethnic or cultural identity) must be subordinate to the other (national or state identity). Accordingly, he suggests three possible combinations for explaining dual identity in Taiwan:

1. Chinese identity is an ethnic identity, while Taiwanese is a national one. This is a ‘hyphenated’ political identity—that is, ‘Chinese-Taiwanese’, comparable to ‘African-American’ and ‘Latin-American’ in the Americas.

⁵⁰ Ibid., 55.

⁵¹ Lin Chia-lung, ‘The political formation of Taiwanese nationalism’, holds this view. Also see footnotes 35 and 36 and related discussion in the main text.

⁵² See: Lee’s ‘Explicit and Implicit Consciousness of Taiwanese Ethnic and National Identity’ and Huang et al.’s ‘The “Double identity” of Taiwanese Chinese’. See footnote 44, and related discussion in the main text.

⁵³ Shih Cheng-feng, ‘Taiwanren de guojia rentong’ (‘Taiwanese People’s National Identity’). In *Guojia rentong lunwenji* (Collections of Paper on National Identity), edited by Taiwan Historical Association (Taipei: Daw Shiang Publishing Co. Ltd, 2001), 14–80.

2. Chinese identity is a cultural identity, whereas Taiwanese is a national (political) one.
3. Chinese identity is a national identity, whereas Taiwanese is an ethnic or regional identity.

Nonetheless, this model raises problems. First, making 'Taiwan' the second element of the hyphenated identity implies that 'Taiwan' is comprehended as a nation-state, as is the case with the second terms in other hyphenated identities, such as 'America' in 'African-American' or 'Britain' in 'English-British'. Yet the notion that all people in Taiwan professing dual identity would conceive of Taiwan as a nation-state is highly disputable. According to surveys, the proportion of the population supporting Taiwan independence is relatively small. Second, as previously mentioned, it remains controversial and problematic to categorise Chinese/Taiwanese identity as an ethnic identity, since past research has never offered solid or convincing theoretical or empirical grounds for doing so. Third, even though the two identities are politically antagonistic to one another and may not be considered as concurrently held national/political identities, there seems no reason to conclude that either one must be subordinate to the other, as long as both identities can plausibly be regarded as regional or cultural identities capable of being held concurrently. In other words, while taking cultural identity into consideration, there is no reason to emphasise either Chinese or Taiwanese culture to the exclusion of the other. Without exploring further why people might opt to regard 'Chinese' or 'Taiwanese' as their cultural identity, Shih's attempt at explanation amounts to an arbitrary assignment of his subjects' responses to ambiguous categories.

What is Identity? An Ontological Discussion

Identity as an Atomic Social Category?

The concept of identity is usually used and analysed in three ways both in the everyday life and in the academia. Firstly, identity can refer to one's 'sense of self, and one's feelings and ideas about oneself'.⁵⁴ Secondly, the idea can mean social roles and thus is generated in the process of socialisation. Thirdly, identity can be viewed as a social category which we can claim or construct 'more actively out of the materials presented to us during socialization, or in our various roles'.⁵⁵ Out of these three options, Chinese/Taiwanese identity confirms more to the third one of a form of social category, namely; it is neither a construction of one's 'self', nor a social role demanding specific duties.

It can be argued that the problematic explanations and analyses of the Chinese and Taiwanese identities in Taiwan discussed in the previous section come from the confusion of these three types of identity (i.e., treating Chinese/Taiwanese identity as a sense of 'self'). However, the real core problem is the use of conventional social identity theory, that is, viewing identity as a rigid, atomic social category. Siniša Malešević explicitly criticises this social identity theory perspective,⁵⁶ arguing that previous theorists in social science⁵⁷ tended to preserve the idea of identity as an 'absolute, rigid and total

⁵⁴ John Scott & Gordon Marshall (eds), *A Dictionary of Sociology* (Oxford University Press, 1998).

⁵⁵ Ibid.

⁵⁶ Malešević, *Identity as Ideology*.

⁵⁷ Including, for example, George H. Mead, *Mind, Self and Society from the Standpoint of a Social Behaviourist* (Chicago, IL: University of Chicago Press, 1934); Peter L. Berger and Thomas Luckman, *The Social Construction of Reality* (New York: Anchor Books, 1966); Richard Jenkins, *Social Identity* (London: Routledge, 2008); Jenkins, *Rethinking Ethnicity* (London: Sage, 1997); Erving Goffman, *Stigma: Notes on the Management of Spoiled Identity* (Harmondsworth: Pelican, 1968); Goffman, *The Presentation of Self in Everyday Life* (London: Allen Lane, 1969); Goffman, *Frame Analysis* (Harmondsworth: Peregrine, 1975); Herbert Blumer, *Symbolic Interactionism: Perspective and Method* (Englewood Cliffs, NJ: Prentice Hall, 1969); Frederick Barth, *Ethnic Groups and Boundaries: The Social Organisation of Culture Difference* (London: George Allen &

concept ... which cannot be reduced further to anything else'.⁵⁸ According to him, the conceptualisation of identity in their studies was based largely on a mathematico-logical dualism: 'Having an "identity" meant being on the [one] hand identical (or in less extreme versions, similar) to a group/category and on the other hand it also meant being different from another group/category (Peter = Peter, Peter ≠ Nancy)'.⁵⁹ However, this is neither how the society functions nor how it should be perceived. As Malešević states: 'events and actors in the social world are, as most social scientists now agree, highly dynamic, flexible, constantly changing, fuzzy, unpredictable and in the continuous process of creating unintended consequences of their action',⁶⁰ and so the conventional conceptualisation of identity fails to offer adequate explanations.⁶¹

Thus, in this conventional perspective, Chinese identity and Taiwanese identity are seen as the reified memberships of groups with the names of 'China/Chinese' and 'Taiwan/Taiwanese'. These identities are endowed with a fixed character that is taken for granted just as the reified groups 'China' and 'Taiwan' are taken for granted. As a result, every person is presumed to have one of these identities, and it is difficult to conceive that anyone has none. Further, since Chinese and Taiwanese identities are imagined as solid and irreducible, they can merely 'combine together' to form 'dual identity' and

Unwin, 1969); Henri Tajfel, *Human Groups and Social Categories* (Cambridge: Cambridge University Press, 1981); and Anthony Cohen, *The Symbolic Construction of Community* (London: Routledge, 1985).

⁵⁸ Malešević, *Identity as Ideology*, 16.

⁵⁹ *ibid.*, 15.

⁶⁰ *ibid.*, 16.

⁶¹ For instance, Tiffany Yip, in the work 'Simultaneously Salient Chinese and American Identities: An Experience Sampling Study of Self-complexity, Context, and Positive Mood among Chinese Young Adults', *Cultural Diversity and Ethnic Minority Psychology* 15, no. 3 (July 2009), 285–294, concludes that the American and Chinese identities of Chinese immigrants and their descendants were simultaneously salient in certain situations, whereas in other situations they were not. Her earlier research in 2005 also showed that an individual's racial identity would be reinforced when he or she was with racially similar peers or engaged in race-based activities. Sonia Roccas and Marilynn Brewer, in 'Social Identity Complexity', *Personality and Social Psychology Review* 6, no. 2 (May 2002), 88–106, have introduced a strategy of 'compartmentalization' to expand upon their observation that some social identities will become salient in certain contexts. The self-complexity put forth by Patricia W. Linville in her work 'Self-complexity as a Cognitive Buffer against Stress-related Illness and Depression', *Journal of Personality and Social Psychology* 52, no. 4 (April 1987), 663–676, also suggests that certain identities might become more important, 'based on the specific demands of one's context' (Yip 2009, 285). These studies stress the fluidity, changeability, and context-dependence of identity, but do not probe more deeply into the factors that produce these characteristics of identity.

cannot be dismantled for further analysis. This understanding, and the need to conform to the demands of modern social science research design, are the primary reason that Chinese and Taiwanese identities have been presumed in past studies only to operate as fixed variables. Their proportions in society are scientifically estimated, and their correlation to party affiliations and other political attitudes are statistically calculated. Such an approach dictates that Chinese and Taiwanese identities can only be understood by being placed in the same pigeonhole—that is, into a certain form of identity, either national (political), ethnic, or cultural. Accordingly, research on this topic is then specifically designed either to statistically measure characteristics that correspond to these categories, such as a person’s view on Taiwan’s future (a political characteristic), or to ferret out cultural attributes such as cultural attachment. Yet, as argued previously in this section, none of these approaches offers a useful explanatory framework for Chinese and Taiwanese identities in Taiwan.

In fact, there are two more significant flaws in the conventional social identity theory. First, as Malešević observed, by looking ‘only inwardly for the psychological or even biological basis of “identity claims”, researchers ‘may miss the outward structural, historical and ideological underpinnings of how, when and why such claims exist at a particular moment in time’.⁶² In other words, this conventional perspective on identity neglects the influence of social structures and power equations on its construction. Conceiving of identity as an atomic social category and measuring it as a fixed operational variable fails to advance our knowledge or adequately explore the intriguing phenomena behind the statistical data offered by descriptive identity research. It does not answer the key questions of why and how these identities have been forged and shaped, or why these identities, rather than others, have become particularly salient in the society.

⁶² Malešević, *Identity as Ideology*, 5.

Second, this conventional approach to social identity does not recognise the role of feelings in identity formation. When addressing the individual's motivation for claiming an identity, social identity-based research tends to focus on two factors—namely, the individual's pursuit of self-enhancement and the goal of uncertainty reduction. The former, briefly, refers to an instinct to 'go to great lengths to ensure that the in-group is better than the out-group',⁶³ a drive that encourages people not only to claim an identity based on its association with a positive image but also to change their identity when that image is negative. Uncertainty reduction, on the other hand, means that people tend to 'gain a better understanding of their world thanks to social categorisation'.⁶⁴ The problem with this approach is that, first, it does not tend to explore why certain groups' images are better than others. It can be agreed that people may be drawn to join the group with higher esteem or better social status, but the real question seems to be what factors endow these groups with better images or cause people to believe that these groups are superior. Also, we can easily find contradictory cases whereby individuals are not happy with their assigned identities. These identities are typically ones they are prohibited from changing, or ones with an inferior image that they are unable to change. This suggests that identity formation cannot be fully explained by a quest for self-enhancement, and that the interactions between individuals and social categories are based on something far more complicated than generating good feelings about the in-group and negative ones about the out-group. Second, the uncertainty reduction model does not adequately explain how and why people could have multiple and mercurial identities. Conversely, it seems that the assumption of multiple and fluid identities may lead to increased uncertainty. In short, while both self-enhancement and

⁶³ Ronald L. Jackson II and Michael A. Hogg, *Encyclopedia of Identity* (Sage, 2010), 99.

⁶⁴ *Ibid.*

uncertainty reduction are based on rational thinking, the operation of identity is never simply a matter of rational choice. Emotions exercise a significant influence.

Identity as Ideology, Habitus, or Ethics?

The fundamental weaknesses analysed above are the result of the ontological presumption of conventional social identity theory—namely, that identity is a rigid, atomic social category; this explanatory framework encounters great difficulty when multiple identities are concerned. However, recognizing multiple meanings (or mercurial, exchangeable, metonymic⁶⁵ characteristics) of identity should be merely the first step in advancing our understanding and developing new perspectives. Otherwise, research will continue to echo the platitude that identity is multiple and mercurial without looking any further.⁶⁶

Several approaches for theorising identity are good candidates to tackle this ontological problem of identity. One is proposed by Malešević, which reconceptualises identity as ideology. In his framework, not only may ideology summon and shape a particular identity (e.g., nationalism and nationalist identity), but also identity has become a powerful ideological device itself. Like the operation of ideology, ‘identitarian

⁶⁵ The word ‘metonymic’ is used by many discourse researchers to describe the contingent, if not arbitrary, attribute of the discursive articulation. For instance, Jacob Torfing, in *New Theories of Discourse: Laclau, Mouffe and Žižek* (Oxford: Blackwell Publishers, 1999), using the image of Muslim fundamentalism in Egypt as an example, suggests that a relation of contiguity could have been established between ‘Muslim fundamentalism’ and ‘social caring’ in the society when the Muslim fundamentalists provided earthquake victims with first aid, blankets and food in 1992. He argues that these actions ‘only gave rise to a metonymical sliding, which provided the conditions of possibility for the articulation of a stronger hegemony based on a metaphorical unity’ (ibid., 112–3).

⁶⁶ Indeed, many contemporary studies have placed emphasis on the role of social meanings in theorising the concept of identity. For instance, Peter J. Burke and Jan E. Stets in *Identity Theory* (Oxford: Oxford University Press, 2009), suggest that social identity is the ‘set of meanings that define who one is when one is an occupant of a particular role in society, a member of a particular group, or claims particular characteristics that identify him or her as a unique person’ (ibid: 3). The abovementioned research concerning Chinese and Taiwanese identity conducted by Liu I-chou (1998), Lin Chia-lung (2002) Lee Mei-chin (2003), and Huang Li-li (2004; 2007) can be categorised as empirical studies in this vein. However, as discussed in the text, these studies only described various meanings attached to certain identities; they did not seek to explain why and how identities are associated with such diverse meanings, nor did they manage to discover the roles of social power and individual feelings in identity formation.

discourses often soothe, naturalise and normalise the ideological currents of our everyday social reality.⁶⁷ Malešević thus proposes ideology as a useful analytical concept to study identity phenomena, rejecting the conventional concepts prevalingly used by poststructuralists and postmodernists, such as ‘discourse’, ‘identity’, and ‘meta-narrative’. His criticism is mainly targeted at the poststructuralist approach’s ‘radical relativism obsessed with the “celebration of differences”’ and its ‘favour of structure over agency.’⁶⁸

One concern of this perspective is that, as Malešević describes, ideology has been deemed as a very contested concept and is in lack of theoretical cultivation, particularly since ‘discourse’ gathers much academic spotlight. For this reason, when compared to discourse, which has been widely used as an analytical tool in various studies—particularly those that adopt the paradigm of discourse analysis, the idea of ideology has a less precise definition, and its operative mechanism is less clarified. For the same reason, viewing identity as ideology does not really solve the problem of presuming that identity is a single, rigid and atomic entity. This is not only because the definition of ‘ideology’ remains rather unclear, but also because, when lacking of further theoretical forging, the term ‘ideology’ still implies a rigid and atomic concept—it is an entity that cannot be further dismantled. Third, the idea of ideology has been developed as a specific analytical tool in the political science—particularly in the scholarly tradition in America—to refer to a collectivity of political beliefs, such as liberalism, socialism, communism, conservatism and so on.⁶⁹ Each of these political ideas usually has specific worldview, clear aspiration, and targeted problems, and has capacity to mobilise people for certain

⁶⁷ Ibid., 4.

⁶⁸ Ibid., 72.

⁶⁹ For instance, Ball and Dagger characterise ideology as ‘a fairly coherent and comprehensive set of ideas that explains and evaluates social conditions, helps people understand their place in society, and provides a program for social and political action’. See Terence Ball and Richard Dagger, *Political Ideologies and the Democratic Ideal* (London: Longman, 2011), 4. The definition of ideology will be discussed in detail in Chapter 5.

political actions. However, identity does not necessarily demand its subjects to act for political goals.

Another approach towards theorising identity is viewing identity as habitus, a concept developed by Pierre Bourdieu. The concept, as Bourdieu explains, refers to ‘a system of schemes of perception and appreciation of practices, cognitive and evaluative structures which are acquired through the lasting experience of a social position.’⁷⁰ In brief, habitus is a miniature individual structure that guides the subject’s understanding of the reality as well as his or her action. It is the bridge between social systems and individual behaviours: On the one hand, habitus is forged and shaped by the macro- or meso-sociocultural structure in society; on the other hand, it is not only influenced by individuals’ life experiences, but also ‘embodied dispositions,’⁷¹ ‘rooted in the body.’⁷² Habitus thus seems to rightly delineate the profile of identity, since identity indeed is both a personal matter and the product of social classification systems, guiding a population’s comprehension of the world and affecting their actions. In addition to the idea of this miniature individual structure, Bourdieu’s theory of symbolic power also helps researchers to explain how the macro-sociocultural systems can be constructed and how an individual’s habitus can be formulated—particularly through the operation of institutions, such as education and national language policy.⁷³ Finally, Bourdieu’s four forms of capital—i.e., economic capital, social capital, cultural capital and symbolic capital⁷⁴—are also useful analytical tools to describe how power is formed and changed in society, and to explain one’s motivation of claiming certain identities. Certainly, people may claim identities for pursuing greater capital.

⁷⁰ Pierre Bourdieu, ‘Social Space and Symbolic Power’, *Sociological Theory* 7, no. 1 (1989), 19.

⁷¹ Richard Jenkins, *Pierre Bourdieu* (Routledge, 1992), 58.

⁷² *Ibid.*, 46.

⁷³ Pierre Bourdieu, *Language and Symbolic Power*, edited by John B. Thompson (Cambridge: Harvard University Press, 1991).

⁷⁴ *Ibid.*

Yet the analysis of identity is not necessarily best advanced by applying Bourdieu's theory. This is not only because the idea remains a 'black box' and requires further elaboration,⁷⁵ but also because it still suggests a single, atomic concept or image of an individual—may it be called 'self', 'identity', or 'habitus'. The problem is: what does 'habitus' really mean? What does this 'miniature individual structure' refer to and consist of? While 'habitus' serves as a useful theoretical buffer between social structure and social agents, it refers to almost everything about an individual. It seems to be another collective (and thus atomic) concept which omnipotently comprises one's life experiences, place, education, culture and so on, and therefore explains almost nothing. Second, while putting emphasis on the role of institutions, it is possible that the research of this approach neglects other non-institutional factors. For instance, images of a particular group (which may highly likely forge and shape one's identity of that group) can be constructed and disseminated not only by institutions (e.g., national education), but also in a more personal or inter-personal way—individuals may simply acquire or formulate an image of a group through their life experiences. Third, stressing institutional power is also possibly to exclude social changes from the analytical scope. While the role and power of institutions tend to be presented as permanent and unchallengeable, it then implies that the discourses institutions promote and the structures they construct are also relatively immutable. Fourth, reflecting its theoretical legacy from Marxism, Bourdieu's theory endeavors to demonstrate the hegemonic influence from the dominant class as well as the detailed mechanism of classes struggle, particularly on the aspect of culture.⁷⁶ He even purposely adopts many economic concepts to theorise these social dynamics,

⁷⁵ Jenkins, *Pierre Bourdieu*, 69. Also see Robert William Connell. *Which Way is Up? Essays on Sex, Class, and Culture* (Allen & Unwin Academic, 1983), 140–61.

⁷⁶ Many analysts point the influence from Marxism on Bourdieu's sociology (though they might disagree on the level of the influence). For instance, Stuart Hall describes Bourdieu as offering the possibility of 'an adequate Marxist theory of ideology'; Richard Jenkins believes that from Marx, especially his *Theses on Feuerbach*, Bourdieu 'derives his interest in practice'. See Stuart Hall, 'The Hinterland of Science: Ideology and the "Sociology of Knowledge"'. In Centre for Contemporary Cultural Studies, *On Ideology* (London: Hutchinson, 1978), 29; and Jenkins, *Pierre Bourdieu* (1992).

such as ‘capital’, ‘market’, and so on. However, with this particular focus, Bourdieu’s theory may ignore significant human activities other than class struggle and politics—for instance, actions generated from a sense of ethics or emotions. For instance, the four types of capital may fail to explain humans’ moral behavior—truly, people practice ethics not simply for accumulating economic, social, cultural or symbolic capital. While it can be argued that ethics is another form of superstructure in Marxist theory constructed for the interest of the bourgeoisie, we can still expect to see the operation of compassion and empathy in communicative interactions between two human beings. In sum, this paper recognises the merits of Bourdieu’s theory and its benefits to the academic field, but this paper also acknowledges the theoretical limitations of his concept ‘habitus’ on theorising identity, and is wary of his stress on the role of institution.

Then, can we adopt an approach which views identity as a form of ethics? After all, ethics and identities share several crucial commonalities. For instance, they both offer their subjects a certain type of cognitive schema to comprehend reality. And they both oblige their subjects to take actions.⁷⁷ Moreover, according to some theorists, one of the most important foundations of human ethics is emotion,⁷⁸ which also plays a very significant role in identity formation. These shared features of ethics and identity bring to the fore the analytical potential of studying identity as ethics.

Importantly, though, not all identity formations are an ethical practice, and not all identifications are formulated due to an imperative sense of moral obligation. Identification, just like other human actions, can be motivated for pursuing non-moral values. These systems of values other than ‘morality’ are particularly distinguished in

⁷⁷ As Peter Singer describes, ‘ethics’ is about ‘how we ought to live. What makes an action the right, rather than the wrong, thing to do? What should our goals be?’ The word is often used to ‘refer to the set of rules, principles, or ways of thinking that guide, or claim authority to guide.’ Peter Singer, *Ethics* (Oxford University Press: 1994), 3–4.

⁷⁸ This is, for instance, the main perspective of David Hume, which Singer depicts as ‘the basis of ethics is to be found in our emotions or, as he calls them, passions’ (*ibid.*, 7). In fact, there is quite a large literature dealing with the relationships between rationality and emotion. I will address this discussion in Chapter 3.

Nietzsche's theory of ethics. The following discussion of James Laidlaw offers a very clear depiction:

Nietzsche explores how the idea of specifically moral goodness could have developed out of a different non-moral idea of the good: one which was opposed not to evil but to the simply inadequate, low, or bad. In pre-moral societies (paradigmatically heroic Greece) as Nietzsche imagines them, the word 'good' conveyed the sense of natural superiority enjoyed by members of the elite. The use of 'good' to describe psychological and other attributes of a person developed from this original socio-political meaning. It was a value judgment, but not yet a moral one. Possessing good qualities, in this meaning of good, is its own good fortune. To be high placed, strong, rich, beautiful, or assertive is not thought of as the reward for some other and pre-existing merit, nor do these qualities call for a further reward or commendation. It would not make sense to say that one had a duty to be like this. Correspondingly, weaker and lower-status people, possessing qualities that are bad (weakness, poverty, ugliness, timidity, and so on), were not 'to blame' for having them. The fact that they possessed them did make these people less impressive and effective, in short less good people, but there was no idea that these were failings which they had an obligation not to have, or for which they ought to feel guilty or deserved punishment.⁷⁹

In fact, it can be seen that some people claim certain identities simply because they believe the concerned identities lend them higher social status, i.e., good qualities such as being high placed, esteemed, or superior over others. Pursuing these values—and thus the formation of these subjects' identities—are thus not quite related to moral deeds or to ethical practices: Their identifications are neither duties nor deeds that are praised and encouraged as virtues—people claim these identities not out of altruism but rather utilitarianism and self-interest. They claim identities not because they want to be moral; rather, they want to be noble—not in the sense of showing high moral principles but in the sense of showing their excellent and superior quality by exhibiting themselves with generic ideas related to good qualities or high social status.

Moreover, treating identity as ethics tends also to neglect subjects' agency. Ethics by definition mean imperative obligations that require subjects to conduct accordingly.

⁷⁹ James Laidlaw, 'For an Anthropology of Ethics and Freedom', *Journal of the Royal Anthropological Institute* (2002): 311-332.

Viewing identity as ethics thus implies the omnipotent influence of identity as well as its definitely successful calling. Besides, subjects refusing the call of ethical duty would be condemned or punished with their own guiltiness—but this is apparently not the scenario when identification is considered. There is no specific rule in Taiwanese society forcing people to identify either Chinese or Taiwanese identity; people rejecting these identities would not feel guilty or ashamed. Clearly, ethics would not be an adequate concept to analyse identification process.⁸⁰

Subject of Nobleness and Identity as (Value-oriented) Discourse

My research attempts to overcome the limitations described above by understanding identity as discourse and identification as a process of articulating meanings and discourse. Foucault classified his concept of discourse into three types.⁸¹ The first one is the smallest analytic unit of discourse—that is, a statement,⁸² which, in the words of Sara Mills, refers to ‘all utterances or texts which have meaning and which have some effects in the real world’.⁸³ The second type is the collective bundle of several statements, an aggregated discursive set that is formed by the mutual connections and articulations of similar discourses. Foucault qualifies this type of discourse as ‘an individualisable group of statements’,⁸⁴ while Mills designates it as ‘groups of utterances which seem to be regulated in some way and which seem to have a coherence and a force to them in

⁸⁰ In fact, as will be illustrated in Chapter 3, to some people, Chinese and Taiwanese identities can function as ethics—these subjects feel obliged to take certain identities, to speak and to act for the identities. However, this is not because identity in and of itself is a type of ethics. Rather, it is because to these subjects, the identities in question are articulated with ethical narratives—i.e., moral discourses that possess characteristics of ethics.

⁸¹ Michel Foucault, *The Archaeology of Knowledge*, translated by Alan Sheridan (London: Tavistock, 1972); and Sara Mills, *Discourse* (London: Routledge, 2004).

⁸² See Jacob Torfing’s, *New Theories of Discourse: Laclau, Mouffe and Žižek*, (Oxford: Blackwell, 1999) for more detailed discussion.

⁸³ Mills, *Discourse*, 6.

⁸⁴ Foucault, *The Archaeology of Knowledge*, 80.

common'.⁸⁵ The third type of discourse refers to structures that guide the abovementioned discursive articulation to form collective sets of discourses. Foucault describes it as 'a regulated practice which accounts for a number of statements'.⁸⁶ Mills calls it 'the rules and structures which produce particular utterances and texts'.⁸⁷ Discourse in this sense is structures or rules (also shaped by other rules) that guide people's thinking and actions:

[Discourses] are conventional ways of talking that both create and are created by conventional ways of thinking. These linked ways of talking and thinking constitute ideologies (sets of interrelated ideas) and serve to circulate power in society. In other words, 'discourse' in this sense involve patterns of belief and habitual action as well as patterns of language. Discourses are ideas as well as ways of talking that influence and are influenced by the ideas.⁸⁸

In short, discourses are not an atomic concept; they can be diversely constituted.

Discourses interact with each other; they aggregate to form larger discourses (the second type); and their aggregation is guided by certain discourses that possess power(s) (the third type).

Viewing identity as discourse then helps us to comprehend the essence of identity as well as its several characteristics:

1. Identity is at its core a generic label. It is designated and used when a classification system is introduced. A classification system is a specific discourse that offers a cognitive schema by which its subjects may comprehend the world.

⁸⁵ See Mills, *Discourse*, 6.

⁸⁶ Foucault, *The Archaeology of Knowledge*, 80.

⁸⁷ See Mills, *Discourse*, 6. With regard to this third type of discourse, this paper uses 'structure' and 'system' generally and alternately to refer to social guidance sets, according to which societal members can properly understand their surroundings and conduct themselves appropriately. The usage of these concepts is thus placed in the general perspective of a structuralist/post-structuralist approach, which comprehends human culture by means of a structure, a 'third order' that connects the objective world with a human's abstract ideas (Deleuze 2004). This paper is not concerned with sophisticated theoretical discussions about the nuances of these terms, since the subtle terminological differences would not greatly affect either the arguments or the analyses of my research on Chinese and Taiwanese identities.

⁸⁸ Barbara Johnstone, *Discourse Analysis* (Blackwell 2008), 3.

It renders human capacity of ‘knowing who we are, knowing who others are, them knowing who we are, us knowing who they think we are, and so on.’⁸⁹

2. Because identity as discourse can be associated and articulated with other different discourses, identity can then acquire different meanings.⁹⁰ For instance, as Chapter 2 illustrates, the term ‘Chinese’ can mean ‘supra-ethnic Chinese nationality’ or ‘*waishengren*’, depending on which of the articulated discourses is highlighted.
3. This discursive articulation is regulated by the macro-discourse (the classification system) in which identities (generic labels) are generated. For instance, the terms ‘Chinese’ and ‘Taiwanese’ are usually (if not always) generated and used in classification systems relating to the ideas of ethnicity, nationality, and so on. These macro classification systems then facilitate the associations between the Chinese/Taiwanese identity and discourses relating to those ideas (e.g. the discourse of the supra-ethnic Chinese nationality discussed in Chapter 2) rather than others, for example, the idea of gender.
4. ‘Identification’ thus means the process of associating one’s own conceptualization (image) of oneself with a certain generic label. The process thus always accompanies the articulation of oneself both with the cognitive schema that generates the corresponding identity and with the various discourses conveyed by the label in question.
5. Thus, identity can be mercurial in at least the following two senses:

⁸⁹ Jenkins, *Social Identity*, 5.

⁹⁰ ‘Articulating’ is a term widely used in discourse theory. In Ernesto Laclau and Chantal Mouffe’s *Hegemony and Socialist Strategy*, it is defined as a ‘practice establishing relations among elements such that their identity is modified as a result of the articulatory practice’ (Laclau and Mouffe, 2001: 105). More specifically, the theory proposes that discourse (meaning) is formed by various elements (i.e., other concepts/meanings/discourses) combining together, and ‘articulating’ is the process of the combination of element. I use this term and ‘associating’ interchangeably.

- (1) Identity is usually articulated with multiple discourses. Different discourses battle with each other in the discursive field of an identity. Some discourses become salient when the context favours them, and some gain relatively long dominant power and monopolize the representativeness of the identity for a particularly long time. This hegemonic discourse can also possibly be replaced by others. The meaning of the identity thus is nebulous and changeable.
 - (2) Individuals are able to exhibit multiple and mutually compatible identities. These identities are compatible as they are sharing similar cognitive schemas; that is, their interpretations of reality, including social relations, orders and norms, do not conflict with each other. Some identities can be stressed by individuals in particular contexts.
6. As an essentially generic label, identity in and of itself does not arouse emotions. Only those identities articulated with 'emotion-oriented discourses' do.
 7. Also, identity in and of itself does not cause behaviour. Only those identities articulated with 'value-oriented discourses' have the capacity to mobilize their subjects to act.
 8. Value-oriented discourses are discourses that set values. Values, including moral values (i.e. which behaviours are good, righteous, just, and encouraged, and which deeds are wrong, unfair, disgraceful and disallowed), social and cultural values, personal preferences (i.e. which are valuable and which are valueless, both to a group/society and to an individual), and political values (i.e. what collective groups, such as society and nation state, should be fighting and struggling for).
 9. Therefore, different identities have different mobilization power, and one identity may have different degrees of influence on different subjects. An identity's efficacy in arousing emotions and generating a sense of obligation depends on its articulated value-oriented discourses. More precisely, the influence of a given

identity is determined either by the power of the associated discourses or by the degree of the discursive articulation.

10. My research identifies two types of emotional discourses—imaged nostalgia and ethical narrative—and three kinds of value-oriented discourses—ethical narrative (as a form of moral values), cultural hierarchy (as a form of social and cultural values), and political ideology (as a form of political values). These will be discussed further in the following section addressing the arrangement of chapters and with empirical evidence in this thesis.

Identity is not simply an essentialised or generalised image of a group membership; it is composed of discourses that are forged, shaped, and empowered in various social structures and historic contexts. To analyse an identity is to illustrate how constitutional meanings, concepts and discourses are associated with it and, therefore, to discover various social discourses that drive its formation. This analytical framework thus can truly dismantle and analyse identity (and even ideology). Further, this approach takes emotions into consideration by arguing that identities only become capable of provoking emotions when articulated with discourses that have that power. Thirdly, this framework covers not only human relations of production that are specifically emphasised by theories in the Marxist paradigm. By taking moral values and emotions on board, the approach used in this thesis also explores human interactions that are prompted by these factors, and illustrate their influence on people's identity formation. Moreover, adopting discourse theory does not necessarily lead to relativism, which caused concerns for Malešević. Rather, discourse analysis explores and compares difference, and research within this paradigm neither necessarily celebrates difference, nor hesitates to make judgements after fair analytical exploration and comparison. Similarly, discourse analysis does not necessarily neglect the role of agency. Besides exploring how discourses forge

and shape one's political orientations and identities, this approach also looks into how individuals may opt for particular discourses (amongst the ones that individuals recognize) according to the value they decide to hold and to pursue. At this precise peculiar moment of decision-making, emerges the agency. Of course, this operates both consciously as well as unconsciously—with regard to the later, available discourses shape the parameters of what we are able to think or know.

Methodology: Grounded Theory

By framing identification as a process of discursive articulation between individuals and meanings or values, my research seeks to explore the meanings of the terms 'China/Chinese' and 'Taiwan/Taiwanese' in the society (more precisely, how people perceive, interpret, and conceptualise these terms) and to discover the underlying social discourses (as well as how people perceive, interpret, and conceptualise these discourses).

To properly investigate how people think about the ideas 'China/Chinese' and 'Taiwan/Taiwanese', my research utilises three major techniques: semi-structured in-depth (intensive) interview method, discourse analysis and grounded theory method. First, the semi-structured in-depth interview is used to collect individual raw data, i.e., individual conceptualisations of terms China, Chinese, Taiwan and Taiwanese, as well as their views on subjects relevant to these generic ideas, such as provincial origin in Taiwan, China's image, Taiwan's future, etc. This technique enables researchers to discover the meanings of identities that are defined and described by the participants themselves, rather than merely offer participants pre-formulated definitions of identities. Owing to this advantage, the in-depth interview method has been widely applied and is suitable for

probing participants' attitudes, perceptions, emotions, changes in attitudes, and the fluidity of people's identities.⁹¹

Secondly, the research utilizes the technique of discourse analysis to individually explore the meanings and discourses that each of my participants uses to support and legitimise their conceptualisations and political views. Many researchers in various disciplines such as linguistics, anthropology, communication, cultural studies, psychology education, etc. have applied this technique. Additionally, it has been a very useful tool in probing the meanings behind humans' linguistic actions as well as to study, as James Paul Gee depicts, 'how language gets recruited "on site" to enact specific social activities and social identities.'

Finally, with respect to the macro-level of research design including sampling (data collection) and theoretical construction, my research adopts grounded theory, a research method that has been developed to fully meet scholarly standards while allowing for a degree of innovation and flexibility. More specifically, the research applies the procedure introduced by Anselm Strauss and Juliet Corbin,⁹² whose approach employs three main instruments: coding, theoretical sampling, and theoretical comparison. These techniques do not require rigid sequences and usually can be carried out in the same research phase, repeatedly if necessary. The purpose of coding is, first, to discover, develop, and relate 'concepts' in the raw data, because 'concept' is the most basic analytic

⁹¹ See: J. Clyde Mitchell, 'Case and situation analysis1', *The Sociological Review* 31, no. 2 (1983): 187–211; Susan Condor and Jackie Abell, 'Vernacular Constructions of "National Identity" in Post-devolution Scotland and England'. In *Devolution and Identity*, edited by John Wilson and Karyn Stapleton (UK: Ashgate, 2006), 51–75.

⁹² Anselm Strauss and Juliet Corbin, *Basics of Qualitative Research: Techniques and Procedures for Developing Grounded Theory* (Thousand Oaks; London: Sage, 1998). More specifically, grounded theory has developed two different approaches, that is, Strauss and Corbin's methods and Barney Glaser's in *Emergence vs Forcing: Basics of Grounded Theory Analysis* (Mill Valley, CA: Sociology Press, 1992). The main characteristic of Glaser's approach is his insistence that in the real grounded theory method, all the data, theories, and even the research questions should emerge from the fieldwork. Thus it is even unnecessary to do literature review before the fieldwork. In contrast, Strauss and Corbin's approach would consent to the importance of having good research questions (research targets) and sound literature review.

unit and offers ‘the building blocks of theory’.⁹³ There are three types of coding: (1) open coding, during which researchers can and should freely and openly tag any interesting concepts and generate categories (coded concepts that stand for phenomena); (2) axial coding, which is the process of relating categories (concepts) to their subcategories, or in Strauss and Corbin’s words, ‘reassembling data that were fractured during open coding ... to form more precise and complete explanations about phenomena’;⁹⁴ and (3) selective coding, in which categories are further organised around a developing central explanatory concept.⁹⁵

Theoretical sampling is the means by which researchers who adopt grounded theory use to collect data. In Strauss and Corbin’s explanation, it is ‘data gathering driven by concepts derived from the evolving theory and based on the concept of “making comparisons,” and its purpose is to go to places, people, or events that will maximise opportunities to discover variations among concepts and to densify categories in terms of their properties and dimensions’.⁹⁶ It follows the same logic with its coding techniques and can also be classified into three different types:

- (1) Open sampling aims to ‘discover, name, and categorize phenomena according to their properties and dimensions’, and thus expects that researchers ‘[will be] open to all possibilities during interviews, during observations, when reading documents, and so on and will want to take full advantage of every opportunity that comes up, exploring each as much as is feasible’.⁹⁷

⁹³ Strauss and Corbin, *Basics of Qualitative Research*, 13.

⁹⁴ *Ibid.*, 123–4.

⁹⁵ *Ibid.*, 143.

⁹⁶ *Ibid.*, 201.

⁹⁷ *Ibid.*, 206.

- (2) Relational and variational sampling is the process in which ‘the researcher is looking for incidents that demonstrate dimensional range or variation of a concept and the relationships among concepts’.⁹⁸
- (3) Highly selective sampling (discriminate sampling) is a technique of selecting cases (sites, persons, and documents from various eras) with the express aim of maximizing opportunities for comparative analysis.⁹⁹

The concept of theoretical comparison is the key element in this research method and thus connects all the procedures above. The technique is applied to the comparison of different concepts (and also different fieldwork cases) in order to determine their similarities and variations, thus enabling researchers to aggregate or differentiate concepts to generate operating categories, develop subcategories, perform direct theoretical sampling and, ultimately, to test the robustness of the emerging central theory.

The number of cases to be collected depends mainly on ‘theoretical saturation’ or ‘data saturation’.¹⁰⁰ The principle is that the process of data collection can be terminated when there are no more new answers, opinions, or reports appearing in the new interview, or, as Strauss and Corbin put it, when ‘no new or relevant data seem to emerge regarding a category, the category is well developed in terms of its properties and dimensions demonstrating variation, and the relationships among categories are well established and validated’.¹⁰¹ Research following this approach aims to discover diverse opinions and construct explanatory schemata based on the collected responses. Hence, similar answers that neither provide additional points of view nor enrich the researchers’ process of constructing theories are not particularly useful; and it is unnecessary to conduct further interviews if they do not offer new perspectives.

⁹⁸ Ibid., 210.

⁹⁹ Ibid., 211.

¹⁰⁰ See Strauss and Corbin, *Basics of Qualitative Research*, and the work of Mario Luis Small, “‘How Many Cases Do I Need?’ On Science and the Logic of Case Selection in Field-based Research”, *Ethnography* 10, no. 1 (March 2009), 5–38, for detailed discussion.

¹⁰¹ Strauss and Corbin, *Basics of Qualitative Research*, 212.

My research fieldwork has comprised three phases. The first, conducted from October 2010 to May 2011, entailed open sampling, using the technique of snowball sampling and recruiting participants through Internet forums. In order to maximise the diversity of cases considered, the only condition applied to recruitment was place of residence (Taipei, Tainan and Kaohsiung). At the same time, relational/variational sampling was achieved by setting several basic prerequisites for case selection according to past research findings, including the subject's party affiliation, provincial origin, and age. In addition, other demographic factors such as gender, education, and career were also carefully tracked in the sampling process. In the second phase, from December 2011 to February 2012, I continued both open sampling and relational/variational sampling although I gave greater attention to the latter based on preliminary findings in the first phase of fieldwork. Finally, the follow-up fieldwork (highly selective sampling) was mainly carried out in the third phase, between December 2012 and February 2013. The interviews were conducted in thirteen of Taiwan's twenty cities and counties.¹⁰² The total number of interview cases is 108 (see Table 1-1 for demographic information). All interviews are transcribed and coded according to the principles of the grounded theory research method discussed above.¹⁰³

Most of the interviews were carried out in coffee shops or quiet restaurants. For some participants, interviews were conducted at their houses or offices. When interviewing, I always began with my self-introduction, indicating that I am a DPhil student at University of Oxford in the U.K., and that the goal of my research is to explore the complex relationships between Taiwanese people's life experiences and their political orientations, including identity. Young participants usually see me as a

¹⁰² Since place of residence was not a significant factor for Chinese/Taiwanese identity according to past research, it was not emphasised as a criterion for case selection in my fieldwork. Nonetheless, the interviews were held in all Taiwan cities and counties except Keelung City and Miaoli, Hsinchu, Nantou, Yunlin, Pingtung, Taitung, and Penghu Counties, which collectively represent a minor segment of Taiwan's total population.

¹⁰³ The duration of interview was averagely more than two hours.

professional young scholar in a preeminent institution. They spoke Mandarin fluently (so that there were no language barriers between us), and they were usually very willing to express their opinions as well as emotions, straightforwardly. Therefore to young participants, I tended to start directly with my core research question—the dual identity in Taiwanese society. However, different strategies were applied when I interviewed elder participants. Generally, my elder informants deemed me as a good, diligent student in a famous school, who is, unlike other regular youngsters, interested in knowing the past and caring about the society. They were also very willing to tell me their stories. Yet, since I could sense that many of them were reluctant to directly express their political views at the beginning, I usually started my interviews with enquiries about their early lives, rather than their identities. Although my Taiwanese language (Taiyu) was not very good, it did not influence my *benshengren* participants' attitudes to me very much, for they understand fewer and fewer young children in Taiwan can speak fluent Taiyu nowadays. Moreover, I usually tended to avoid arguments with my interviewees. I expressed that I understood what they said, and challenged their views by saying: 'I know. But some might say ...'.

In the four analytical chapters, stories of 23 participants are told. These subjects are selected not only according to the significance of their cases to the theme I address in each section but also according to the quality of their interviews (e.g. the duration and the wealth of detail). Moreover, these cases are chosen in an attempt to present the rich diversity of Chinese/Taiwanese identity in Taiwanese society and to challenge some conventional stereotypes, for instance, the idea that native-born *benshengren* should embrace Taiwanese identity, or that *waishengren* groups should possess a Chinese identity. It thus means that the life experiences of these 23 participants may not be representative of the general population in Taiwan, but they can all be representative of the themes I would like to address in each chapter. For instance, the story of a participant, Jane, will

be presented in Chapter 3, in the section illustrating the mechanism of East-West antagonism. She was born in the U.S. and was brought back to Taiwan to receive primary education; and she was then again sent to the states to pursue her bachelor degree. Although I argue her life experience did influence her perception of the East-West antagonist discourse, I do not suggest that everyone who has a similar background will believe in the same discourse or possess the same identity pattern. Since the research believes it is fruitless to think whether Jane's—or any of the presented participants'—life experiences can account for a specific type of identity, the research do not carry on surveys to explore how representative a specific life experience or a demographic element of a participant is in the society. For the main goals of this research and for the qualitative nature of it, this research cannot and does not provide statistical correlations between the concerned identities and other variables. Nevertheless, in each chapter I will offer figures and numbers about my collected data for my readers to preliminarily comprehend how many participants in my fieldwork are supposedly influenced by a specific discourse.

A limitation that must be acknowledged is therefore that, again, due to the qualitative nature of this research, the thesis offers neither the latest estimated numbers or proportions with respect to Chinese and Taiwanese identities in Taiwanese society, nor an account of the latest statistical trends. More precisely, my research cannot and do not aim to develop an explanatory model that can be confirmed by statistics. It does not meet the demands of a purely quantitative perspective. As Uwe Flick would have it, by selecting cases 'according to their (expected) level of new insights for the developing theory in relation to the state of theory elaboration so far, this research employs 'neither random sampling nor stratification to make a sample representative'.¹⁰⁴ Rather than focusing on the representativeness of the sample, it concentrates on 'representativeness

¹⁰⁴ Flick, Uwe, *An Introduction to Qualitative Research* (London: SAGE, 2009), 118.

of concepts and how concepts vary dimensionally' by arriving at data saturation and theoretical saturation.¹⁰⁵

It must also be noted that my research mainly concentrates on the major and most numerous *benshengren* and *waishengren* ethnic groups. Others, such as Hakka and Taiwanese aboriginals, are not within its scope. Considering the extent to which their dialects and customs differ from those of *benshengren* and *waishengren*, and the impact of particular government policies on them (particularly in the case of Taiwanese aboriginals), as well as their possibly different perceptions of Taiwan's history and the development of Taiwanese nationalism, the Chinese and Taiwanese identities of Hakka and Taiwanese aboriginals should be a fascinating topic to explore and might well produce varied and remarkable insights into those identities and related theories.

Table 1-1: Demographic Information for 108 Cases

<i>Categories</i>	<i>Sub-categories</i>	<i>Number of Cases</i>
Gender	Male	64
	Female	44
Chinese/Taiwanese Identity	Chinese	5
	Dual	53
	Taiwanese	47
	Other Response	3
Year of Birth	Before 1945 ¹⁰⁶	32
	1946–1983	47
	After 1984 ¹⁰⁷	29
Provincial origin	<i>Benshengren</i>	74
	<i>Waishengren</i>	34
Residential region	North Taiwan ¹⁰⁸	44
	Central Taiwan	17
	South Taiwan ¹⁰⁹	38
	East Taiwan ¹¹⁰	9
Total Number of Cases		108

¹⁰⁵ Strauss and Corbin, *Basics of Qualitative Research*, 214.

¹⁰⁶ In this year, Japan was defeated in World War II and Taiwan was retaken by the KMT government.

¹⁰⁷ Subjects who were born in this year (1984) entered primary school in 2000 and used new-edition textbooks that placed more emphasis on Taiwan than the old ones had done.

¹⁰⁸ Cities and Counties north of Miaoli County.

¹⁰⁹ Cities and Counties south of Chiayi County.

¹¹⁰ The category includes Ilan, Hualien, and Taitung.

Chapter Arrangement: Meaning, Emotion, Hierarchy and Political Ideology

Based on the analysis of 108 interviews collected in my fieldwork, my research identifies several types of emotion- and value-oriented discourse that take the main responsibility of shaping the formation of Taiwanese people's Chinese and Taiwanese identities. They are: ethical narrative, imagined nostalgia, cultural hierarchy, and political ideology. These discourses formulate the themes of each chapter. Yet, before further illustrating the mechanism of these four types of discourse, Chapter Two, entitled 'Meanings', first explores the diverse meanings and social discourses associated with Chinese and Taiwanese identities. With particular emphasis on people's conceptualization of the term, 'Chinese', the chapter looks at the different ways in which the members of different groups have interpreted the notion of being Chinese. For instance, the Chinese nationalism promoted by the KMT tends to relate Chinese to the concept of *Zhonghuaminzu* (中華民族), the supra-ethnic Chinese nationality; Taiwanese nationalism regards Chinese merely as referring to the people of the PRC; in the discourse of provincial origin, which is based on the antagonism between *waishengren* and *benshengren* and, accordingly, associates the idea of Chinese with *waishengren*. These discourses magnetise various meanings and concepts and aggregate them upon the identity concepts according to their own internal discursive logic. This discursive competition for the power to define is the factor that explains why the idea of Chinese is highly contested in Taiwan and cannot be adequately fitted into categories such as national identity, culture identity, or ethnic identity.

The following chapters address the four types of emotion- or value-oriented discourses. Chapter Three, entitled as 'Feelings', deals with ethical narrative and imagined nostalgia, since these two discourses are particularly capable of provoking an emotional

response. Ethical narrative refers to a particular discourse that narrates a dualistic antagonism between the benevolent in-group and the malignant out-group. This type of narrative produces not only an emotional coordinate but also a moral coordinate, which instructs its subject how to feel and how to act. More precisely, it demands that the subject has positive feelings for the in-group and negative ones for the out-group, and constructs a moral obligation to support the former and oppose the latter. The chapter illustrates five ethical narratives in Taiwanese society that influence people's Chinese and Taiwanese identities. They are: East-West antagonism, China-Taiwan antagonism, anti-*waishengren* discourse, anti-KMT discourse, and anti-DPP discourse.

Imagined nostalgia refers to a fictional, constructed sentimental longing or wistful affection for the past, particularly with respect to places. This sentiment is imagined and constructed because the subject was not necessarily present in those places in person. Rather, his/her feelings for them may be mediated by a third party, whether a beloved family member, pop culture (fiction, movies, television), or national education. The discourse of imagined nostalgia particularly places emphasis on the important value of nation, ethnic group, or any similar idea of collectivity. It functions by combining (1) one's feeling of familiarity (to a place) and (2) a certain generic idea (usually an ethnic group or a nation), generating a strong sense of 'this place (hometown or nation) is mine', 'this is my mother country', 'this is my people', etc. The place can be a remote one; subject of imagined nostalgia does not have to be in that place before his/her life to generate his/her fervent passion for the place or for the generic group. Due to this capacity, imagined nostalgia is frequently invoked in identity politics.

Chapter Four deals with the concept of 'cultural hierarchy', a social evaluative system that endows identities with comparative values. Three cultural hierarchies are salient in Taiwanese society. These include the different connotations of speaking

Mandarin¹¹¹ versus speaking Taiyu¹¹² (the Taiwanese language); an image of superiority of the Taiwanese (people in Taiwan) over the Chinese (people of the PRC); and the hierarchy cued as the dualism between Westerners and Easterners, whereby the former are regarded as superior to the latter.

While asserting the importance of feelings in the identity equation, this thesis does not assert that identity politics are purely emotion-based. In examining the role of political ideology in people's identity formation, Chapter Five takes political aspirations into account.¹¹³ In this chapter I identify at least three such ideologies in Taiwanese society (apart from Chinese and Taiwanese nationalism): (1) conservatism, which entails a preference for social stability (social order) and an aversion to radical change; (2) 'patriarchal capitalism', which values economic growth while relying on the state to achieve this goal; and (3) 'anti-authoritarianism', which advocates democratic political-party system, whether out of a belief in traditional liberalism (placing value on liberty) or an aspiration for socialism (placing value on social equity). Secondly, I suggest that ideology influences a person's identity through a third party, usually by means of the person's images of political parties. For some informants in my fieldwork research, the KMT is a capable leader that not only can offer people a stable, secure society but also can lead Taiwan to remarkable economic growth. The DPP, on the other hand, has negative connotations, associated with riot and disorder, because the party is credited with radical political reforms and social movements in Taiwan in the 1980s. These

¹¹¹ Mandarin is also called *Guoyu* (國語, literally, 'national language') because it is the official language of Taiwan. Some Taiwanese deem it an imported 'Chinese' language, promoted and legitimated by the exiled KMT government in an attempt to dominate the 'Taiwanese' people, and thus call the language *Beijing-hua* (北京話, literally, 'Beijing's language').

¹¹² Taiyu (臺語, literally, Taiwanese language) actually refers to the Hoklo dialect. It is called 'Taiwanese' because the dialect is spoken by the Hoklo, the largest ethnic group with the greatest population in Taiwanese society. It is also known as *Minnan-hua* (閩南話), which means, literally, 'dialect used by people living in the southern Fujian Province' (also called *Min* [閩]). See footnotes 13 and 14.

¹¹³ The idea of ideology will be discussed in detail in Chapter 5. Yet, very briefly, this thesis refers to the working definition of ideology attributed to Ball and Dagger, who characterise it as 'a fairly coherent and comprehensive set of ideas that explains and evaluates social conditions, helps people understand their place in society, and provides a program for social and political action'. See Terence Ball and Richard Dagger, *Political Ideologies and the Democratic Ideal* (London: Longman, 2011), 4.

respective images are thus likely to lead these participants, who can be regarded as conservatives and 'patriarchal capitalists' for their political value preferences, to support the KMT and the discourses it promotes, including that of Chinese identity. Likewise, people of anti-authoritarian bent might form positive impressions of the DPP and tend to support its discourses, including that of Taiwanese identity.

Presenting the various identity patterns observed in fieldwork, this thesis reveals that there is not a determinant identity in Taiwanese society. Nor does identity exert an omnipotent influence; it can be taken away, obliterated, or altered. The concluding chapter thereby deals with the issue of self-identification, which is referred to a process of articulation of, and association with, meanings and discourses that the identified objects convey. The concluding chapter further goes on to propose six modes of response to the interpellation of identity that can be deduced from my research. These are: (1) failing to recognise; (2) ignoring; (3) unwillingly accepting; (4) conforming; (5) challenging and deconstructing; and (6) changing identity. Identity politics do not always work, and we should be skeptical of any form of identity interpellation since, in the contemporary era, identity is one of the most effective tools for political elites to use to manipulate popular feeling and mobilise people for political ends, which could include constructing a fictional narrative of oppression or an imagined enemy to distract people from the real issue at stake. It is the absolute duty of all humankind, not merely intellectuals, to examine carefully the validity of any narrative motivated by identity politics: Does what it describe correspond to the reality? Are those whom it targets as enemies actually responsible for existing oppressive conditions? Are there alternative ideologies to which people might reasonably adhere? Identity politics are a double-edged sword, to be approached with caution.

Appendix I: Timeline of some significant historical events in Taiwan and the birth years of the participants¹¹⁴ presented in the thesis

Year	Events
1895	Japan starts its colonisation of Taiwan.
1900	The Eight-Nation Alliance enters Beijing and sacks the imperial palaces.
1911	The overthrow of the Qing Dynasty established by Manchuria in 1642, and establishment of the Republic of China (ROC) under the 'Three Peoples' Principles' of Sun Yat-Sen.
1922	Liang (female) is born in Hualian, Taiwan.
1927	Takala (male) is born in Miaoli, Taiwan.
1930	Meizhu (female) is born in Taichung, Taiwan.
1932	Lan (female) is born in Taichung Houli, Taiwan.
1935	Anhui (female) is born in Hualien, Taiwan.
1937	Wanling (female) is born in Zhongli City, Taiwan.
1941	Kenbo (male) and Keting (female) are born in Tainan County, Taiwan.
1945	The end of the World War II; the Republic of China government under its ruling party, the KMT (Nationalists), takes over Taiwan with the assistance of the United States.
1947	The 228 Incident, beginning February 28. A week after a native Taiwan protest against corrupt KMT rule, the Nanjing ROC government sends troops that brutally put down the civil disturbance.
1949	The establishment of the People's Republic of China (PRC). The KMT (Nationalist) government retreats to Taiwan and declares martial law, suspending all civil liberties in the Constitution. .
1950	Luohung (male, <i>benshengren</i>) is born in Pingdong County; Dr Liu (male, <i>benshengren</i>) is born at Hualian County.
1954	Chenli (male, <i>waishengren</i>) is born in Kaohsiung County; Xinyi (female, <i>benshengren</i>) in Zhongli City.
1955	Weiting (male, <i>benshengren</i>) is born in Yunlin County.
1962	Yueying (female, <i>waishengren</i>) is born in Taipei.
1971	The ROC is forced to withdraw from the United Nations when the world organisation

¹¹⁴ Their names are bestowed, yet the delineated social backgrounds, life experiences, and places of birth/residence remain authentic.

	recognises the Peoples' Republic of China as the rightful occupant of the China seat.
1975	Chiang Kai-shek passes away; his son Chiang Ching-kuo succeeds.
1977	Jane (female, <i>waishengren</i>) is born in Taipei City.
1979	The United States announces that, in one year, it will sever diplomatic relations with the ROC and recognise the PRC.
1980	The 'Kaohsiung Incident Trials' openly reported in newspapers make the opposition candidates' demands for self-determination for the people of Taiwan widely known to the public, despite long censorship of media.
1980	Yen (male, <i>benshengren</i>) is born in Tainan City.
1981	Haoping (male, <i>benshengren</i>) is born in Ilan County.
1985	Shuhui (female, <i>waishengren</i>) is born in Pingtung County.
1986	The establishment of the Democratic Progressive Party (DPP), a formal organisation of the opposition.
1987	Kaiwei (male, <i>benshengren</i>) is born in the Taipei City. Lifting of martial law (including the ban on organising political parties).
1988	President Chiang Ching-kuo passes away; native-born Vice President Lee Teng-hui succeeds him as KMT chairman and the president of ROC.
1989	Liwen (female, <i>waishengren</i>) is born in the Taipei City.
1990	Wild Lily student movement (野百合運動) launches: Huge demonstrations of students and professors demand democratic reform as Lee Teng-hui again takes presidential office; it is agreed that president will be directly elected in 1996.
1992	Yuxin (female, <i>waishengren</i>) is born in Taipei City.
1996	Lee Teng-hui wins the first direct presidential election. The Third Taiwan Strait Crisis occurs, with the PRC shooting a missile past Taiwan.
2000	The DPP's Chen Shui-bian wins the second presidential election due to a factional split of the ruling KMT.
2008	The KMT's Ma Ying-jeou, formerly English secretary to Chiang Ching-kuo, wins the Presidency and makes friendly overtures to China.

Meanings

Introduction

In my thesis, identity is conceptualised as discourse,¹ and identification (the establishment of one's identity) is understood to develop in a symbolic interaction, i.e., a process of articulating meanings of the identified object with the identifying subject. Meaning thus serves as the primary cognitive foundation for the formation of identity. The concept of meaning in this chapter is not only the basic discursive element of identity formation but also a good analytical unit. In fieldwork, inquiries such as 'What does an identity (such as Chinese or Taiwanese) mean to you?' are my typical prelude to probing a subject's interpretation and perception of an identity. Studying an identity (discourse) is thus studying how its different meanings are endowed and perceived, that is, how different concepts as well as discourses are articulated with that identity.

To illustrate this mechanism of articulating meaning, this chapter begins with an examination of the Chinese identities² held by several participants encountered in my fieldwork. The goal of this chapter is thus twofold—firstly, by taking 'Chinese' discourse as a prime example, to explain the complex facets of the Chinese identity in Taiwanese society, and, secondly, by doing so, to illustrate how discourses function in regards to identity formation.

¹ As presented in the introduction, Foucault's concept of discourse can refer to three levels of concept: it can be a statement, a set of statements, or rule that guides the formation of collective statements. Theoretically, 'meaning' (as a form of discourse) can also refer to these three types of discourse. However, my research mainly regards meaning as a basic discursive element, a primary unit that can be extracted from discourses or from identities for analytical purposes. See Michel Foucault, *The Archaeology of Knowledge*, translated by Alan Sheridan (London: Tavistock, 1972); and Sara Mills, *Discourse* (London: Routledge, 2004).

² Chinese identity is given priority in this chapter because, compared to Taiwanese identity, the idea 'Chinese' is endowed with more diverse and complicated meanings by my fieldwork subjects. More precisely, while my fieldwork uncovered a rich diversity of meanings of 'Chinese', Taiwanese identity was, for most of the participants, a matter of having been born and grown up in Taiwan (or, for some, speaking the Taiwanese language). The diverse meanings of the term 'Chinese' make it a better starting point for exploring the discursive structure and the constitutive mechanism of these identities.

Five major characteristics of Chinese discourse (identity) in Taiwanese society are disclosed in the chapter. The first characteristic is the diversity of meanings articulated by the term ‘Chinese’. My analysis classifies three principal meanings (i.e., discursive sets) that the term ‘Chinese’ can represent: (1) the supra-ethnic Chinese nationality (also known as *Zhonghua-minzu*, 中華民族, a supra-ethnic category covering all ethnic minorities in China and Taiwan) and related concepts, such as *Hanren* (漢人) and *huaren* (華人);³ (2) the people of the People’s Republic of China (PRC); and (3) the *waishengren*⁴ ethnic group in Taiwan.⁵

Second, this chapter argues that people’s allocation of groups into these discursive sets is not based on common ethnologic knowledge or on rational deduction. Rather, they make classifications according to a sense of their similarity. In fact, conventional criteria used in common ethnologic parlance (such as shared culture, ethnic phenotypes, common ancestors, and so forth) to judge whether one fits a definition of Chinese are usually vague, indefinite, and indeterminable.⁶ Subjects who refer to these

³ In the common sense, the idea *Hanren* is used to refer to people of Han ethnicity, since the term is composed of the two characters, *Han* (漢) and *ren* (人; people). *huaren*, by its very simple definition, means people of the supra-ethnic Chinese nationality, because the term is constituted by *Hua* (華; means the ‘supra-ethnic Chinese nationality’ or ‘Chinese’ for short) and *ren*.

⁴ The *waishengren* ethnic group refers to the mainlanders who came to Taiwan after 1945 (when the ROC government took over the island in the end of World War II) and their offspring. The contrasting category is *benshengren*, i.e., the native Taiwanese who lived there in the Japanese colonial period and their offspring. See the introduction chapter for further discussions.

⁵ For instance, Shih Cheng-feng, ‘Taiwanren de guojia rentong’ (‘Taiwanese People’s National Identity’), in *Guojia renting lunwenji* (Collections of Paper on National Identity), edited by Taiwan History Association (Taipei: Daw Shiang Publishing Co. Ltd., 2001), 14–80, believes that ‘Chinese’ in Taiwanese society can mean *huaren* (華人; which Shih refers to those people sharing Chinese culture) and *Hanren* (漢人; which Shih uses to emphasise the ancestral aspect). As well, it can designate citizens of the People’s Republic of China, and sometimes citizens of the ROC. He also suggests that, to many Taiwanese nationalists, ‘Chinese’ also negatively implies *wailai-tongzhibizhe* (外來統治者; literally, ‘the invaders from the outside’). Meanwhile, Taiwanese, from the narrowest to the broadest definition, can refer to: *Minnanren* (閩南人; literally, people of *Minnan* (閩南), south region of Fujian Province of China); *benshengren* (本省人); ‘people who subjectively identify with Taiwan’; ‘residents of Taiwan’; and ‘citizens of the Republic of China (中華民國, *Zhonghua-minguo*)’.

⁶ This vagueness and unclearness of the definition of ‘Chinese’ can be observed in many discussions with regard to the concepts of ‘Chineseness’ and ‘Han’ in the contemporary literature of Chinese studies. For instance, Thomas Mullaney, in his introduction to *Critical Han Studies*, edited by him and his colleagues (University of California Press, 2012), observed ‘at least three ways in which Han and China are entangled: the long-standing commensuration between Han and ‘Chinese culture’; a similarly

criteria to describe their concept of Chinese often generate a wealth of contradictions. For instance, people defining Chinese as people who speak Mandarin and share common Chinese culture usually tend to include all ethnic minorities into the category of Chinese. But this categorisation is problematic because many ethnic minorities cannot speak Mandarin and do not practice Han culture at all. This contradictory categorisation suggests that subjects do not really make their classification according to logic but rather on the basis of subjectively perceived resemblances between groups and discursive generic concepts.

Third, I contend that one's perception and interpretation of an identity (or a generic concept) is forged and shaped by one's experiences of early life. These experiences can involve not only the national education one received at school but also family members' political orientations, common perceptions and definitions of generic ideas in the society, and so on. Fourth, individuals may face multiple discourses competing to represent the idea of Chinese throughout their lives. For instance, some people might feel conflicted and unsure of whether Chinese should refer to the supra-ethnic Chinese nationality or to the idea of *waishengren*, and they may develop various strategies to deal with this discursive conflict: They can firmly claim a specific, long-term identity, or they can elect an identity temporally to fit a particular context.

Finally, the influence of personal life experience on individuals' identity also implicates the work of the three master social discourses in Taiwan—the provincial-origin discourse (that is, the notion that the major social division in Taiwanese society results from the conflict between two ethnic groups: *waishengren* and *benshengren*), Chinese

long-standing equivalence between Han and 'the Chinese people'; and the intimate relationship between Han and the political-geographic concept of China'. (ibid., 4). Scholars such as Wang Gungwu in his work, *The Chineseness of China: Selected Essays* (Oxford University Press, 1991), have also observed that the idea of 'Chineseness' can contain diverse meanings with regards to space, people, and cultural and societal characteristics. Ien Ang, in the work of 'Can One Say No to Chineseness? Pushing the Limits of the Diasporic Paradigm', *boundary 2* 25, no. 3 (Autumn 1998), 223–242, explains that Chineseness 'is not a category with a fixed content – be it racial, cultural, or geographical—but operates as an open and indeterminate signifier whose meanings are constantly renegotiated and rearticulated' (ibid., 225).

nationalism, and Taiwanese nationalism.⁷ However, the last section presents a particular subject from my fieldwork as a prime example of how early experiences may outweigh the effects of these grand discourses on identity formation.

A Brief History of Taiwan

Since one's perceptions and conceptualisation of the terms 'Chinese' and 'Taiwanese' are forged and shaped to a great extent by various social discourses as well as one's early environments, it is useful and even necessary to briefly review Taiwan's modern history. From the seventeenth century, migrants from south China had established settlements on the island. Mainly speaking Hoklo and Hakka languages of Chinese, these settlers soon penetrated the inner regions. Their territorial expansion sometimes caused conflict with the aboriginal population, who were Austronesians related to those in the Philippines and Pacific.⁸ Many of the latter were politically and culturally assimilated to a large extent; others migrated to inner mountain areas. In 1624 the Dutch East India Company briefly took control of the southwest coast, but it was repulsed in 1662 by remnants of the Ming Dynasty fleeing the new Manchurian rulers of China, the Qing Dynasty. In 1683 the Qing Dynasty seized control of the west coast of Taiwan. Three Qing-administered counties, Taiwan (臺灣), Fengshan (鳳山) and Zhuluo (諸羅), were established on the west side of the island.⁹ In 1895, after two centuries' loose governance, the Qing Dynasty was forced to cede Taiwan to Japan for its defeat in the First Sino-

⁷ See the introduction and Chapter 5 for my discussions on the concept of nationalism.

⁸ Studies on the genetic and linguistic affinities between aboriginal Taiwanese and populations from Oceania and Southeast Asia are, for example, Robert Blust, 'The Prehistory of the Austronesian-Speaking Peoples: A View from Language', *Journal of World Prehistory*, 9–4 (December 1995), 453–510; Terry Melton, et al., 'Genetic Evidence for the Proto-Austronesian Homeland in Asia: mtDNA and Nuclear DNA Variation in Taiwanese Aboriginal Tribes', *The American Journal of Human Genetics*, 63–6 (December 1998), 1807–1823; Cristian Capelli, et al., 'A Predominantly Indigenous Paternal Heritage for the Austronesian-speaking Peoples of Insular Southeast Asia and Oceania', *The American Journal of Human Genetics*, 68–2 (February 2001), 432–443.

⁹ Robert Gardella, 'From Treaty Ports to Provincial Status, 1860–1894.' In *Taiwan: A New History*, edited by Murray A. Rubinstein (New York: M.E. Sharpe, 1999), 163–200.

Japanese War. The Japanese army took over the island with considerable bloodshed, as well as losing troops who succumbed to local resistance and tropical diseases.¹⁰ Japan quickly surveyed the land and conducted a census of the population. It established and ameliorated modern communications, police, education, and public health systems, and improved irrigation and agricultural methods, making Taiwan its rice bowl.¹¹ In the 1930s it instituted assimilation policies, and later conscripted Taiwanese for its war effort. In this era, educated Taiwanese were able to fluently speak and write Japanese.¹²

Defeated in World War II, the Japanese colonialists departed, and a new governor was sent by the Republic of China (ROC) under the rule of the Kuomintang (KMT) in late 1945. However, conditions of civil war, corruption, and hyperinflation in China soon led to economic deterioration in Taiwan;¹³ a civil protest that broke out in Taiwan on February 28, 1947, was brutally suppressed by Chinese troops.¹⁴ Generalissimo Chiang Kai-shek began planning his retrenchment in Taiwan even before the final victory of the Chinese Communist Party;¹⁵ 1.5 million military, bureaucrats, and businessmen fled to Taiwan from the mainland in 1949.¹⁶ Haunted by its catastrophic defeat on the mainland, the KMT government imposed authoritarian rule over Taiwan for almost five decades—the era characterised by the implement of martial law,

¹⁰ According to Harry J. Lamley, 6,000 Taiwanese inhabitants died in battle during the 1895 war of resistance, and 5,300 Japanese soldiers, military porters, and police were killed or wounded. See his 'Taiwan Under Japanese Rule, 1895–1945: The Vicissitudes of Colonialism'. In *Taiwan: A New History*, edited by Murray A. Rubinstein (New York: M.E. Sharpe, 1999), 208.

¹¹ Cheng Tun-jen, 'Transforming Taiwan's Economic Structure in the 20th Century', *The China Quarterly*, 165 (March 2001), 19–36.

¹² Lamley, 'Taiwan Under Japanese Rule', 201–260.

¹³ See Robert Edmondson, 'The February 28 Incident and National Identity'. In *Memories of the Future: National Identity Issues and the Search for a New Taiwan*, edited by Corcuff, Stéphane (London and New York: M.E. Sharpe, 2002), 28.

¹⁴ *Ibid.*, 25–46.

¹⁵ Jay Taylor, *The Generalissimo: Chiang Kai-shek and the Struggle for Modern China* (Harvard University Press, 2009), 397–399.

¹⁶ The precise number is unavailable and can be only estimated by the national census conducted in 1956 and 1966. See: Taiwansheng hukou pucha chu (臺灣省戶口普查處; The Household Census Office of Taiwan Province Government), *Zhonghua-minguo hukou pucha baogaoshu* (中華民國戶口普查報告書; *Household Census Report of the Republic of China*) 2, no. 1 (1956); and *Taimin diqu hukou ji zhuzhai pucha baogaoshu* (臺閩地區戶口及住宅普查報告書; *Household and Residence Census Report of the Taimin Region*) 2, no. 1 (1966).

promotion of Chinese nationalist discourses, and banning of local dialects.¹⁷ Meanwhile, Taiwan was integrated into the United States' anti-communist programmes in Southeast Asia in the Cold War era, receiving military hardware and food supplements such as wheat and soybeans up until 1965. The support from the United States (including financial aid, political support, economic advices and preferential trade treatment)¹⁸ and the KMT government's policies like land reform, import substitution industrialization, development of the small and medium enterprises, enabled Taiwan to achieve remarkable economic growth in the 1970s and 1980s. At the cultural and political aspects, the KMT regime endeavoured in promoting Chinese nationalism by banning speaking Taiwanese language (Taiyu), oppressing indigenous cultures and other measures.¹⁹ During this period, most of the positions in the central governments were held by *waishengren* groups.

Nonetheless, in 1971, the United Nations accepted the PRC as the sole legitimate representative of China, displacing the ROC representative. In 1979, the US decided to recognise the PRC and sever diplomatic relations with the ROC. These diplomatic upsets caused domestic disturbances: democratic movements, followed by the rise of Taiwanese nationalism, capitalised on Taiwan's uncertain future.²⁰ Local elections were hotly contested with the rise of various social movements and protests, and demands for political reforms increased.²¹ Eventually, in 1987, the government lifted martial law; soon

¹⁷ The martial law was promulgated on May 19, 1949, and lifted on July 15, 1987.

¹⁸ As Robert E. Baldwin and Douglas Nelson indicate, 'Taiwan and other developing countries enjoyed improved access to U.S. markets without having to open up their own markets. Beginning in 1976, developing countries were also given duty-free treatment in the United States on many manufactured goods'. See Robert E. Baldwin and Douglas Nelson, 'The Political Economy of U.S.-Taiwanese Trade and Other International Economic Relations', in *Trade and Protectionism, NBER-EASE Volume 2*, edited by Takatoshi Ito and Anne O. Krueger (Massachusetts, Cambridge: National Bureau of Economic Research, 1993): 307–337.

¹⁹ See Christopher Hughes, *Taiwan and Chinese Nationalism: National Identity and Status in International Society* (London; New York: Routledge, 1997).

²⁰ Hsiao, A-chin. *Return to Reality: Political and Cultural Change in 1970s Taiwan and the Postwar Generation* (Taipei: Institute of Sociology, Academia Sinica, 2008).

²¹ J. Bruce Jacobs, "'Taiwanization'" in Taiwan's Politics.' In *Cultural, Ethnic, and Political Nationalism in Contemporary Taiwan*, edited by John Makeham & A-chin Hsiao (New York: Palgrave Macmillan, 2005), 17–54.

newspaper censorship and the ban on political organizing were also terminated. The first political party capable of challenging the KMT's regime, the Democratic Progress Party (DPP), which lays much stress on Taiwanese identity and advocates Taiwan independence, was established in 1986.²² Its members gradually gained a significant number of seats in the parliament and were elected as mayors of several major cities and counties since the late 1980s.²³ It is argued that both the early activists and the DPP elites significantly facilitated the development of Taiwanese identity in Taiwan.²⁴ In 2000, DPP took the presidency, the first party turnover in Taiwanese history.²⁵ However, plagued by corruption scandals and regarded as unable to boost the economy or to establish mutually beneficial relations with China, the DPP lost in 2008 and 2014 to the KMT.²⁶

²² It was one year before the end of the martial law by design.

²³ For instance, in 1989, three years after the DPP was established, You Ching (尤清) won the mayorship of Taipei County; Yu Shyi-kun (游錫堃), Ilan County; Fan Chen-tsung (范振宗), Hsinchu County; Chou Ching-yu (周清玉), Changhua County; Yu Chen Yueh-ying (余陳月瑛), Kaohsiung County; Su Tseng-chang (蘇貞昌), Pingtung County.

²⁴ In his book, *Taiwan and Chinese Nationalism*, Christopher Hughes has explicitly illustrated the developments of both Chinese nationalism and Taiwanese nationalism in Taiwanese history. While his work largely emphasises on the roles of government and political elites, my analyses in this thesis probe into more discursive, cultural, and individual levels, exploring the interactions between one's Chinese and Taiwanese identities and various social discourses generated in Taiwanese history.

²⁵ In 2000 and 2004 the DPP member Chen Shui-bian (陳水扁) won the presidential election, which granted the party the administrative power for eight years.

²⁶ Two DPP presidential candidates, Frank Hsieh Chang-ting (謝長廷) in 2008 and Tsai Ing-wen (蔡英文) in 2012, lost the elections to Ma Ying-jeou (馬英九).

Defining ‘Chinese’ as the Supra-ethnic Chinese Nationality

Two facts about those of my fieldwork subjects who claim Chinese identities should be noted in advance: First, amongst all the hundreds of participants, there were only two who identified themselves solely as Chinese and rejected Taiwanese identity.²⁷ In other words, most participants in my study regarded themselves as Chinese in a form of dual identity (identifying themselves both as Chinese and Taiwanese). Second, most of them conceptualised the idea of ‘Chinese’ with multiple meanings. By presenting the reports of the two outliers, Haoping and Kaiwei, this section aims to illustrate the one of the major discourses that defines ‘Chinese’—the discourse of the supra-ethnic Chinese nationality—and how it and its articulation with ‘Chinese’ is legitimated by other various discourses concerning nation/nationality, such as racial/phenotypic discourse, the myth of common ancestors (myth of origin), the attribute of common language, and discourses of territory and shared history.

Haoping is a 32-year-old military officer in Taipei City. He was born in 1982 in Ilan County (宜蘭縣), a relatively rural area on the northeast side of Taiwan, as the first child in a *benshengren* family with a younger sister. His father once worked in construction in the county, and his mother was an insurance broker. Both resigned from their previous jobs and now are consignees of agricultural products. Haoping studied in a primary school and a junior high school in Ilan and went to a vocational school after that because of his low academic achievement. Probably for that reason, as well as out of economic considerations, he joined the army after graduation. Now he is a captain in the military; he married a nurse in his hometown, and they had a baby boy in 2012.

I first interviewed Haoping in 2010 in Taipei. I began by offering five options for him to describe his identity: (1) Chinese only; (2) Taiwanese only; (3) both Chinese and

²⁷ They are Matian (discussed in this chapter) and Dongming (discussed in Chapter 4).

Taiwanese; (4) both Chinese and Taiwanese, but primarily Taiwanese; (5) both Chinese and Taiwanese, but primarily Chinese. This exchange followed:

HAOPING: I would choose 'both Chinese and Taiwanese, but Taiwanese primarily'. But, speaking of Chinese, I'm not sure if you are referring to *daluren* (大陸人; literally, mainlanders or the PRC citizens).

Q: No, I have no such intention. It is what you think that matters.

HAOPING: Then, I think it (Chinese) refers to *daluren*.

Q: If so, do you still think yourself Chinese? Do you think yourself as *daluren*?

HAOPING: No... When I think of myself as Chinese, the term actually refers to, eh, the whole... It should mean *zhonghua-minzu* (中華民族, the supra-ethnic Chinese nationality) not only *daluren*. It should be... Well, shouldn't *all Asian people* be Chinese?

Q: Asian? All Asians?

HAOPING: Yes. It is just like... 'I am Taiwanese, and I am also *Ilan-ren* (a person from Ilan)'.
Q: Is it? So, a 'Chinese-Taiwanese' person is just like a 'Taiwanese-Ilan-ren'?

HAOPING: Yes. That's what I'm thinking; that's my metaphor... My [definition of] Chinese refers to all...

all Asians. Okay, all Asians... That is, amongst all Chinese people in Asia, I am Taiwanese. I am one of them [Chinese people].

Q: So, to you, the idea 'Chinese'...

HAOPING: It does not only refer to [people in] a specific country. It is not only a country. It is like *dongfangren* (東方人, Easterners) and *xifangren* (西方人, Westerners), a [concept of] race.

Clearly to Haoping the term 'Chinese' can be at once very exclusive (mainlanders) and very inclusive (the supra-ethnic Chinese nationality, Asian, or Easterners). When he identifies himself as Chinese, he is adapting its inclusive meanings, regarding himself as a member of the supra-ethnic Chinese nationality, Asian, or Easterners.

However, these inclusive definitions are also generic ideas, and a desirable analysis should dig deeper into what these generic ideas really mean to participants. Responding to my further inquiries, Haoping re-defined and proscribed the generic idea of 'Chinese' with two strict criteria: first, Chinese should have black eyes and yellow-skin phenotypes; second, they must speak Mandarin. By doing so, Haoping excludes people of other Asian countries, such as Japan and Korea, and so includes only people of China, Taiwan, and Singapore in his category of 'Chinese'. Singaporeans are Chinese because, as

Haoping goes on to explain, their ancestors came from 'China', regardless of the fact that Singaporean is actually a collective term that includes at least four distinctive ethnic groups.²⁸ In short, his conceptualisation of the idea of Chinese is in fact smaller than the generic idea of Asian (people residing in the East Asian region) and larger than just PRC citizens; he equates Chinese more with the supra-ethnic Chinese nationality. In other words, the supra-ethnic Chinese nationality is the main meaning of Chinese when Haoping claims the identity.

The report also shows that two discourses are used by Haoping to define his ideas of Chinese; they are: racial discourse (Chinese have yellow skin and black eyes) and discourse of common language (Chinese speak Mandarin). In fact, more constructing discourses can be identified when Haoping explains other relevant generic concepts. When asked to define the supra-ethnic Chinese nationality, he folded major ethnic groups on mainland China and Taiwan, such as Han, Manchu, Mongolian, Hui, Tibetan, and Taiwanese aboriginals into the category. He says that these ethnic groups are a part of the supra-ethnic Chinese nationality (thus Chinese) because they reside within the territories of China (and Taiwan), and because they have been governed by Chinese rulers (or have been the governors of Chinese people) for many centuries; they have been thoroughly ethnically-mixed. Further, in the interview, Haoping equates Chinese not only with the category of the supra-ethnic Chinese nationality but also with the concept of *huaren* (華人).²⁹ He defines *huaren* as people with yellow skin and black eyes who speak Mandarin, and includes the ethnic minorities of China in the category.³⁰ As for the concept of *Hanren* (漢人), Haoping also equates the idea generally to *huaren*, but

²⁸ There are four major ethnic groups in the official ethnic classification system of Singapore: Chinese (Han), Malay, Indian, and other foreigners.

²⁹ This commensuration makes sense and is consistent with common perceptions, because the word *huaren* is coined by combining two Chinese characters: *hua* (華), which means and is an abbreviation of the terms 'Zhonghua-minzhu' (the supra-ethnic Chinese nationality), and *ren* (人), which means 'people'.

³⁰ However, Haoping does not regard Taiwanese aboriginals as *huaren*.

with an added nuance: he uses the former to refer to Chinese who live in the territories of China and Taiwan, and uses the later to designate those who live abroad. From this perspective, Haoping excludes Singaporean from the category of *Hanren* because Singapore is a country abroad. However, his conceptualisation of the term *Hanren* is unconventional, because by the official definition (as provided in school textbooks), *Hanren* means people of Han ethnicity since the word is coined by the two Chinese characters: ‘Han’ and ‘ren’ (people). Therefore Singaporean is actually *Hanren* by this official definition.

Table 2-1: Haoping’s views of ‘Chinese’, ‘huaren’, and ‘Hanren’

<i>Generic Concepts</i>	<i>Definitions</i>
Chinese	Equates with <i>huaren</i> and the supra-ethnic Chinese nationality; includes people in Hong Kong, Singaporeans, and all ethnic minorities in China and Taiwan; excludes Japanese, Koreans, Thais, and Vietnamese.
<i>huaren</i>	Equates with the abovementioned idea of Chinese except for Taiwanese aboriginals.
<i>Hanren</i>	Signifies Chinese who live in the territories of China and Taiwan (thus excluding Singaporeans).

This thus explicitly shows the complexity of Haoping’s conceptualisation of Chinese—the term is associated not only with multiple generic ideas (*huaren*, *Hanren*, mainlanders, the supra-ethnic Chinese nationality, Asian, Easterners, etc.) but also with various discourses. These discourses include racial/phenotypic discourse, myth of common ancestors (myth of origin), the attribute of common language, discourses of territory, and shared history. They are the discourses that Haoping uses to formulate and legitimate his Chinese identity; they are discursive rules that guide the formation of his idea of ‘Chinese’.

A Mechanism for Forming Chinese Discourses: Using Feelings of Similarity to Associate Elements with Discursive Sets

Another example is Kaiwei. He is a 27-year-old (born in 1987) postgraduate student and currently lives in Tainan, where we had our interview. Yet he was born and spent most of his youth in Taipei. The apartment of his family is located in the Da'an (大安) district of Taipei, an affluent neighbourhood in the wealthiest city of Taiwan where many bourgeois families live. In our interview, Kaiwei selected a dual identity for himself. Yet, while most participants who chose a dual identity would prioritise their Taiwanese identity, Kaiwei refused to do so, simply stating that he was both.³¹ When asked, 'Why do you select 'Chinese?'' Kaiwei answered unwaveringly: 'Because we are all a yellow race'. When asked about the characteristics of being Chinese, he replied: 'people of yellow race, who speak Mandarin Chinese, and who come from China'.

Table 2-2: Kaiwei's views of the Concepts 'Chinese', '*huaren*', and '*Hanren*'

<i>Generic Concepts</i>	<i>Definitions</i>
Chinese	Equates with <i>Hanren</i> and the supra-ethnic Chinese nationality; includes people in Hong Kong, Singaporean, and all ethnic minorities in China and Taiwan; excludes Thais and Vietnamese. Kaiwei is uncertain about whether Japanese and Korean can be categorised as Chinese.
<i>huaren</i>	People who can speak Mandarin, which means that the ethnic minorities in China and Taiwanese aboriginals are excluded from this category.
<i>Hanren</i>	Yellow races, including Japanese and Korean.

Again, three discourses are used to define Kaiwei's idea of Chinese. The first is the discourse of racial phenotypes. By embracing this discourse, Kaiwei resembles Haoping in that he sees Singaporeans as Chinese, and he excludes people in other

³¹ I argue that Kaiwei's unwillingness to prioritise Taiwanese identity over his Chinese identity is due to the work of the anti-DPP (Democratic Progressive Party) discourse. The mechanism is illustrated in Chapter 3.

Southeast Asian countries, such as Thailand and Vietnam, from the category, because their skins are slightly darker than Chinese. Second, Kaiwei believes that speaking Mandarin can be one of the criteria, but he seems not to place too much stress on it. In fact, he considers all ethnic minorities in China to be Chinese, and he insists on this view even after realising that ethnic minorities might have their own languages other than Mandarin, such as Tibetan. Last but not least, like Haoping, Kaiwei encompasses ethnic minorities within the category of Chinese in the belief that they have had close connections with Chinese dynasties for many centuries. ‘Taiwanese’, a generic identity with which Kaiwei labels himself, are surely Chinese because their ancestors came from the mainland. At this point, it is myth of origin that exercises the influence.

Despite the many similarities in Haoping’s and Kaiwei’s discursive constitutions of the concept ‘Chinese’, there are still differences, specifically in the ways they conceptualise the terms ‘*huaren*’ and ‘*Hanren*’. While Haoping inclusively equates *huaren* with Chinese and the supra-ethnic Chinese nationality, Kaiwei conceives of *huaren* much more exclusively, allowing its meaning only to encompass people who can speak Mandarin. In fact, Kaiwei uses the term ‘*Hanren*’ to express Haoping’s concept of ‘*huaren*’. His idea of *Hanren* refers to all yellow races and therefore comprises not only all ethnic minorities but also other nations, such as Japan and Korea.

This difference and the diversity of meaning formation (discursive articulation) can also be observed in the porous definitions of the term ‘Chinese’. As identified above that ‘Chinese’ is composed of various meanings and discourses, such as racial phenotypes, language, and (historic) residential areas, but the idea can be determined neither by each single attribute, nor by conditions combining these criteria. And usually, these criteria conflict with each other: When defining Chinese with racial phenotypes, Haoping and Kaiwei cannot explain why Japanese and Korean are not Chinese. When deeming as Chinese those who speak Mandarin, they have to clarify why those non-Mandarin-

speaking ethnic minorities in China are also categorised as Chinese. Defining Chinese as people living in the territories of China and Taiwan cannot account for why Singaporeans are Chinese.

The terminological complexity clearly suggests that their definitions of these ideas do not necessarily follow the common ethnologic knowledge taught by social or institutional authorities, such as the information presented in primary school textbooks. Rather, the formation of these discursive bundles is based on individuals' subjective sense of similarity. More precisely, individuals articulate concepts into a discursive category due to a subjective perception of similarity between the concepts. When Haoping designates all ethnic minorities as Chinese, it is not because he knows exactly what the definition of Chinese is and the logical reasons why these minorities should be one element of it, but because he vaguely senses a similarity between these ethnic groups and the notion of Chinese. More direct evidence of this articulation based on impressions (feelings of similarity) is found in the way these interviewees explain these ethnic concepts—they explicitly utilise expressions of personal feelings, such as 'I feel' (我覺得) or 'I sense' (我感覺).

This articulation of meaning based on feelings of similarity is best illustrated by the report of one of my field participants, Yuxin, a 22-year-old (born in 1992) female student in Taipei. She is the youngest child in her family and has an older brother. Her father is a *waishengren*³² who works as a processor in a factory owned by a large food company, and her mother is a low-level clerk at a middle-sized firm in the Taipei County.³³ Yuxin was a diligent student and attended a top high school. At the time of

³² I deliberately include a *waishengren* participant not only because all the other cases thus far are of *benshengren*, but also to challenge the conventional prejudice in Taiwanese society that all *waishengren* should identify themselves as Chinese.

³³ Taipei County has been newly renamed New Taipei City in 2009, but Yuxin was still used to calling it 'Taipei County' in the interview.

interview she had just entered college, pursuing a bachelor's degree in statistics at a private university.

Like Haoping and Kaiwei, Yuxin possesses the supra-ethnic view of Chinese nationality, and with this conception she identifies Taiwanese, and herself, as belonging to the supra ethnic Chinese nationality.³⁴ Yet, once again, nuances are revealed by her terminology. Where Haoping and Kaiwei tend to have a more restricted concept of the supra-ethnic Chinese nationality and to exclude other Asians, such as Japanese, Koreans, and Thais, from the category, Yuxin, by contrast, takes it to include almost all East-Asian people. In her conception, Japanese, Koreans, Thais, and Taiwanese are all parts of the supra-ethnic Chinese nationality. To Yuxin, the terms '*Zhonghua-minzu*' (the supra-ethnic Chinese nationality), '*Hanren*', '*huaren*', and 'Easterners' refer to the same discursive set. They are interchangeable and, in her mind, can all designate the same concept.

How did Yuxin formulate this particular ethnic view? The following conversation about her ideas of *huaren* and Hakka reveals clues:

Q: Can Taiwanese aboriginals be regarded as *huaren*?

YUXIN: Probably. But no one would say that.

Q: Hakka are *huaren*, as well?

YUXIN: They are just like Taiwanese aboriginals. No one would call them that. It would be strange.

Q: But you said Japanese are *huaren*.

YUXIN: '*huaren*' has sort of the feeling of 'Easterners'; it has some 'Chinese cultural' feeling.

Q: So, Japanese don't count?

YUXIN: Japanese are. They are [*huaren*].

Q: But you said '*huaren*' has a sort of 'Chinese cultural' feeling.

YUXIN: They [Japanese] have learned Chinese culture! It's just like Han culture. Chinese culture and Han culture are quite similar. Only the names are different.

Q: So, Japanese, Taiwanese aboriginals, and Hakka, amongst these four, which is more akin to *huaren*?

YUXIN: Of course the Japanese.

Q: Why?

³⁴ What is nevertheless interesting is that Yuxin does not directly equate the supra-ethnic Chinese nationality with the idea of Chinese and thus, to her, Taiwanese is not Chinese. More precisely, Taiwanese and Chinese are two compatible generic ideas, and they can both be equally included in the category of the supra-ethnic Chinese nationality. Her Chinese/Taiwanese identity is discussed in a following section.

YUXIN: Taiwanese aboriginals and Hakka are more *bentu* (本土, literally, 'native'). They don't seem to have 'outbound' space to develop, so they wouldn't say they are *huaren*, would they? The term '*huaren*', it *feels* like... when [people] try to develop outbound, they would say they are *huaren*.

Generally, people in Taiwan would categorise Hakka, rather than Japanese, as *huaren*, yet Yuxin does not. To Yuxin, *huaren* is associated with the words 'outbound' and 'overseas'. When speaking of *huaren*, the first idea that pops into her mind is *huaren-dianying* (華人電影; literally, films produced by *huaren* or films in Mandarin). To Yuxin, these are different to films produced in Taiwan. In other words, the term *huaren* refers to a larger generic category than Taiwan; it connotes to her a Mandarin-speaking group or a group of people sharing Chinese culture. And since this group is larger than Taiwan, it is external to Taiwan. The images of departing Taiwan, or being overseas, are thus tightly bound with Yuxin's conceptualisation of the idea of *huaren*. Hakka, by contrast, is perceived as more 'local' (less 'overseas') because Yuxin learnt that it is one of the ethnic groups of (inside) Taiwan. So for Yuxin, Hakka is less relevant to the idea of *huaren* than Japanese, because the latter denotes a national/ethnic group 'outside' Taiwan. This suggests that Yuxin's ethnic view (her articulation of these ethnic concepts) is constructed not according to elements of conventional knowledge, such as ethnic origin, culture, or location, but according to her own feelings and impressions.³⁵

³⁵ Thus, this mechanism can also illustrate the terminological complexity of 'Han' and 'Chineseness' that many Han-studies scholars have remarked, by suggesting that this complexity actually results from an arbitrary metonymical sliding between terms and between many nationalist discourses. Since the discursive system is congregated and consolidated by individuals' direct feelings and perceptions, these terms ('Han/Hanren', '*bua*/*huaren*', 'China/Chinese') not only can be metonymically exchanged, but can also be arbitrarily linked to any 'Chinese ethnic traits', or, for that matter, anything relating to China.

Table 2-3: Yuxin's views of the Ideas 'Chinese', '*huaren*', and '*Hanren*'

<i>Generic Concepts</i>	<i>Definitions</i>
Chinese	The PRC citizens, including all ethnic minorities in China.
<i>huaren</i>	All Asian, including Japanese, Korean, Thais, Vietnamese, etc. (but somehow Taiwanese aboriginals and Hakka are excluded).
<i>Hanren</i>	All Asian, including Japanese, Korean, Thais, Vietnamese, etc.

Regulating Discourse Formation:

The Influence of Subjects' Early Life Experiences

Although articulation of ideas may be based on feelings, it is not entirely capricious. In fact, discursive formation is regulated by certain salient discourses—that is, the third type of discourse in Foucault's conception, the discourse that is capable of guiding discursive elements to aggregate and form another discourse.³⁶ As previously illustrated, the elements and discourses relevant to ethnicity and nation/nationality are readily articulated into the discourse of the supra-ethnic Chinese nationality. People such as the participants described above tend to use attributes that usually describe an ethnicity or a nation, such as lineage, kinship, phenotypic characteristics, collective memories (history), culture, to define the concept of generic terms such as 'Han', '*hua*', and 'Chinese'. When defining these terms, they are less likely to invoke other criteria, such as the genital differences that define gender identity or the production relationship that shapes class identity. The ethnic/nationalist discourse is the salient discourse capable of shaping those generic concepts.

Yet why is a particular ethnic/nationalist discourse (or a set of discourses) salient for an individual's identity (or for his/her interpretation of a certain generic concept)?

³⁶ The theory of discourse is discussed in the introduction chapter.

One of the main factors is the individual's life experience.³⁷ When one's conceptualisation of an idea is first formed, it will inevitably be influenced by some discourses that one acquires in a particular context. All the same, the idea will change as the subject keeps acquiring relevant knowledge and information through one's life. These influential discourses can be knowledge transmitted by family members and friends, or what is taught in school, or popular sayings in the society, or narratives produced in the mass media and pop culture. This section, taking the supra-ethnic Chinese nationality as an example, depicts the influence of the national education and pop culture in Taiwanese society.

National Education and the Concept of the Supra-ethnic Chinese Nationality

The concept of the supra-ethnic Chinese nationality can be traced back to the late eighteenth century on the Chinese mainland. Many scholars have discussed at length how this idea was developed during that period by political reformers intent on overthrowing the decaying Qing Dynasty (1644-1912).³⁸ Dru C. Gladney, for instance, argues that the Chinese term *minzu* (民族; ethnicity/nation) 'does not enter the Chinese language until the start of the 20th century'.³⁹ With the aim of overthrowing the Qing Empire and establishing the first Republic of China, Dr Sun Yat-sen 'advocated the idea of the 'Five Peoples of China' (*wuzu-gonghe* 五族共和)', that is, the supra-ethnic concept of nationality

³⁷ One might suggest Bourdieu's notion of habitus (i.e., 'miniature individual structure') to be the main influential factor (see the discussion in the introduction). However, a person's 'habitus' should also be formulated in one's life course. In other words, it is still individual history, path and choice of trajectory that plays the key role.

³⁸ See Frank Dikötter, 'Racial Discourse in China: Continuities and Permutations', in *The Construction of Racial Identities in China and Japan: Historical and Contemporary Perspectives*, edited by Frank Dikötter (London: Hurst & Company, 1997), 12–33; Dru C. Gladney, *Dislocating China: Reflections on Muslims, Minorities, and Other Subaltern Subjects* (Chicago: The University of Chicago Press, 2004); and Thomas S. Mullaney, James Leibold, Stéphane Gros, and Eric Vanden Bussche, *Critical Han Studies* (Berkeley; L.A.; London: University of California Press, 2012).

³⁹ Gladney, *Dislocating China*.

of the Republic including the Han, Manchu, Mongolian, Hui (Muslim) and Tibetan (ibid: 14–5).⁴⁰ In his 1997 work, Frank Dikötter also suggests that the introduction or construction of the racial discourses of yellow race and descent ideology of *yanhuang-zisun* (炎黃子孫; literally, ‘the offspring of the Yan Emperor and the Yellow Emperor’)⁴¹ could be traced even as far back as the late nineteenth century. He argues that 1898 reformers such as Liang Qichao (梁啟超) and Kang Youwei (康有為) ‘selectively appropriated scientific knowledge from foreign discursive repertoires, actively manipulated evolutionary theories to bolster theories of pure origin; they reconfigured folk notions of patrilineal descent into a racial discourse which represented all inhabitants of China as the descendants of the Yellow Emperor’ (ibid: 15). These racial discourses were usually invoked in the context of resisting the Western imperialist. As discussed by Dikötter, the ideas ‘China is the yellow race’, and ‘only the yellow race competes with the white race’ were introduced in the textbooks of primary schools in the early 1920s (ibid: 21).

The concept of the supra-ethnic Chinese nationality was officially introduced to Taiwan and promoted in the society after the Kuomintang (KMT) government took over the island,⁴² particularly through its national education system. For instance, an illustration in a unit titled ‘Tracing Our Roots’ (追尋我們的根) in the textbooks used before 1985 portrays a flourishing tree standing on the territory of the ROC (including both mainland China and Taiwan), implying that all people in China and Taiwan have the

⁴⁰ Rana Mitter, in his work *The Manchurian Myth: Nationalism, Resistance, and Collaboration in Modern China* (University of California Press, 2000), further suggests the term *minzu* (i.e. nation) was actually differently perceived and interpreted by the elites of that period: ‘it was primarily a citizen-based concept for Liang Qichao, a race-based one for Sun Yatsen, and a class-based one for Mao Zedong. Nonetheless, the basic concept of “nation” as a new, modern type of political identity runs through all their constructions of the term’ (ibid., 10).

⁴¹ The two emperors are conventionally regarded as the earliest common ancestors of Chinese people, and thus can be used to specify the nationality.

⁴²

same origins (see Figure 1-2).⁴³ The text in the unit explains that all Taiwanese people, including the Taiwan aboriginals, can trace their ethnic origins to mainland China. The version used between 1990 and 2000 also clearly taught that all ethnic groups in China and Taiwan constitute the supra-ethnic Chinese nationality; two of a total of three units in the ninth volume were titled *Zhonghua-minzu* (中華民族) and described the differences among ethnic minorities in China and how they had been assimilated over time into a single national entity.

Aside from the idea of supra-ethnicity, the concept of ‘Chinese’ has also been promoted in primary school textbooks. Before 1990, the textbooks included all people in Taiwan in the category of Chinese. Introducing the story of Lian Heng (連橫), author of the ‘General History of Taiwan’ (臺灣通史) and a native-born Taiwanese intellectual who witnessed the Japanese occupation, one textbook comments: ‘If the Chinese did not write the history of Taiwan and let the Japanese do it, the facts would have been distorted; Chinese would have forgotten their past, and forgotten themselves’.⁴⁴ However, between 1990 and 2000 the textbooks used the term ‘Chinese’ in more cultural and ethnic contexts. They described *chunjie* (春節; literally, ‘spring festival’, which actually means the Lunar New Year) as an important holiday to Chinese people’. Another unit titled ‘Achievements of the Chinese People’ (中國人的成就) introduced the technological and cultural inventions accomplished by this collective entity.

The accounts of my interviewees suggest that this meaning construction in the national education did influence their identities. Haoping states that, when he was little,

⁴³ The primary school textbooks (on social studies subjects) in Taiwan can roughly be divided into three phases according to the design of their content: before 1990, between 1990 and 2000, and after 2000 (see Appendix I). Their differences in content and section arrangement also suggests that the first two phases placed much weight on Chinese nationalism, while the version after 2000 is oriented more towards Taiwanese nationalism. See further discussion in the main text and in the later analysis of Yuxin’s case.

⁴⁴ The original text in Mandarin is: ‘如果中國人自己不寫台灣史, 而讓佔據台灣的日本人來寫, 一定會歪曲事實, 使中國人忘了過去, 也忘了自己’.

he only applied ‘Chinese’ to *daluren* (mainlanders) and excluded Taiwanese from the category. Not until he knew about Chinese modern history from school textbooks, particularly the part in which the KMT fought the civil war with the Chinese Communist Party (CCP) and then retreated to Taiwan, did he realise that ‘we are actually the same’ and ‘Taiwanese are Chinese too’. Kaiwei had a similar experience: He states specifically that when he was a schoolboy he thought the term ‘China’ only referred to *dalu* (the mainland). He added Taiwanese to the category after he learned more about history from what he calls the ‘KMT’s’ textbook.

Pop Culture and the Supra-ethnic Chinese Nationality

In addition to national education, Kaiwei speaks of the impact of popular culture, particularly movies, on his idea of Chinese. The following quotation shows his reply to my question about when people in Taiwan started to claim Chinese identity:

KAIWEI: We Taiwanese people came from mainland China. Besides, we have called ourselves ‘Chinese’ for a long time, haven’t we?

Q: How long ago?

KAIWEI: I don’t know how long ...[I am] probably also influenced by movies.

Q: What kind of movies?

KAIWEI: [Laugh] Movies shown on cable TV. They play Hong Kong movies a lot. They always say, ‘Chinese... etc’.

Q: Can you give me an example?

KAIWEI: Like ‘*Zhongguoren buda Zhongguoren*’ [中國人不打中國人, literally, ‘Chinese don’t fight with Chinese’]. When watching these movies, I feel that we seem to be Chinese, too.

‘*Zhongguoren buda zhongguoren*’ (Chinese don’t fight with Chinese) is a popular saying featured in most kung-fu movies that are set in the late Qing Dynasty and early Republican China. The phrase implies that Chinese people should be united (avoid fighting with each other) in order to confront invasion and oppression from imperialist

Western countries. Kaiwei's referring to this sentence and this kind of movie, which has a particular historical background, clearly shows that his conceptualisation of, and identification with, Chineseness was significantly shaped by the nationalist discourses developed in eighteenth-century China, and these discourses can be effectively appropriated and utilised in the propagation of popular culture.

Also an example is the case of Lan, an 82-year-old (born in 1932), native-born Taiwanese who experienced Japan's colonial rule in the early twentieth century. Her case shows, first, that not only people of the younger generations but also some elders in Taiwan possess the idea of the supra-ethnic Chinese nationality; and second, how the mass media can disseminate, if not legitimise, this supra-ethnic view in Taiwanese society. Lan was born and spent most of her life in Houli (后里), a town in Changhua County (彰化縣; in the region of central Taiwan). The place held significance to the Japan colonialists for its rich sugar production; thus it had many Japanese residents during the Japanese colonial period, 1895–1945. Lan's family made a living by planting sugar cane. She attended elementary school but never dedicated herself to study because of the high demand for labour in the peasant family. In addition, her studies were often interrupted by air raids, particularly when she was in her third and fourth grades.⁴⁵ She graduated from primary school in 1945, when the Japanese left and the Chinese Nationalists 'recovered' Taiwan (*guangfu* [光復]; literally, 'gloriously regained' the island from Japanese occupation).⁴⁶ She never pursued further education but stayed at home, helping out the family. Except for five or six years when she worked in a shoe factory, Lan has been a farmer for most of her life.

⁴⁵ The elementary school had six grades in total. Lan was around eight or nine years old when she was a third or fourth grade student.

⁴⁶ This is Lan's wording in the interview. The terminological usage is significant because it implies that Lan actually accepted the KMT's discourse in its interpretation of history. Those critical of the KMT party might use other words, such as 'retreat', for instance, since soon after the KMT lost mainland China to the Chinese communists.

Although she was not educated by the KMT regime, Lan nonetheless upholds the idea of a supra-ethnic Chinese nationality. More precisely, just as Haoping includes Korean and Japan into the category of Chinese on first impression, and Kaiwei encompasses the people of China, Taiwan, Japan and Korea in the category of *Hanren* by adopting the ideology of origin, Lan also considers both Chinese and Japanese people as Chinese. She believes these two groups (Chinese and Japanese) share the same ancestry. In the interview, Lan explains her view in terms of the ancient myth of Xu Fu (徐福). In the story, Xu Fu was sent by Qin Shi Huang⁴⁷ (秦始皇) to the North to look for the elixir of eternal life. He took 500 boys and girls with him and finally arrived at the land we now call Japan. Although failing at Qin Shi Huang's mission, Xu Fu and the children eventually settled down in Japan and became the ancestors of the current Japanese people.

According to Lan, she heard this story on the radio at some point after the Japanese left. The Japanese did not teach them this story at school. 'They taught Japanese history, but not in that much detail', Lan says. In other words, since she had not received any formal education under the KMT government, her conceptualisation of the supra-ethnic Chinese nationality (which encompassed Japanese people) actually came from her surroundings. Her case clearly shows: first, in Taiwanese society, the discourse of the supra-ethnic Chinese nationality has great potential to be accepted by people despite their demographic characteristics such as provincial-origin background and generation. To these people, all the relevant nationalistic factors, such as imagined blood ties and geographical juxtaposition, offer persuasive reason not only to take Chinese identity but also even to associate other nationals such as Japanese and Koreans into the supra-ethnic category of Chinese nationality. Second, Lan's case demonstrates that institutionalised

⁴⁷ Qin Shi Huang was the first emperor of the Qin Dynasty (221-206 BC).

education is not the single channel for the inculcation of nationalist discourse. Neither Lan's conceptualisation of the supra-ethnic Chinese nationality nor her self-identification with the supra-ethnic category was forged by national education.⁴⁸ The individual's surroundings, and pop culture in the society, also exercise a great influence.

Meanings of 'Chinese' other than the Supra-ethnic Chinese Nationality:

People of the PRC (Mainlanders) and *Waishengren*

Defining 'Chinese' as the People of the PRC

To Haoping and Kaiwei, the idea of the supra-ethnic Chinese nationality represents the idea of Chinese (or vice versa); when they identify themselves as Chinese, they are actually identifying themselves as members of the supra-ethnic Chinese nationality. That is not to say that people who regard themselves as members of the supra-ethnic Chinese nationality necessarily think of themselves as Chinese. For some of them, the term 'Chinese' seems to resonate, not with the idea of the supra-ethnic Chinese nationality but, rather, with other meanings. Yuxin, the college student described above, is such a person. She includes herself in the definition of the supra-ethnic Chinese nationality, but declines to identify herself as Chinese.⁴⁹ To her, the term 'Chinese' refers only to people of the PRC and not to the idea of the supra-ethnic Chinese nationality; Chinese can be an element of the supra-ethnic group, but it cannot be the name of that group.

Yuxin has always conceived of China and Taiwan as two different countries.

Actually, she considers China as an 'antagonistic other' with respect to Taiwan. She has

⁴⁸ My presentation of Lan's case does not suggest that her idea of supra-ethnic Chinese nationality came from the indoctrination of the radio. Rather, her case is given here simply to demonstrate how the discourse of origin and the myth of Han ethnicity can be disseminated in Taiwanese society via routes other than national education.

⁴⁹ Moreover, Yuxin is also reluctant to be referred to by the terms '*Hanren*' and '*huaren*', because she 'feels' these terms are 'too Chinese'.

observed much that convinced her of China's implacable hostility to Taiwan since the early 1990s. During her adolescence, she witnessed China trying to exclude Taiwan from the international stage, competing with Taiwan for diplomatic relations with other nations, forbidding Taiwan from using 'ROC' (Republic of China) or 'Taiwan' to represent itself (only 'Chinese Taipei' is allowed), intervening in Taiwan's domestic politics by firing missiles near Taiwan, and threatening Taiwanese people with its military power. To Yuxin, China has always been a bully and oppressor of Taiwan. She expressly uses the word 'hatred' to describe her feelings towards China.

Her negative impressions apply not only to the political entity (China) but also to the Chinese people. She thinks 'Chinese and Taiwanese have very different "cultures"', by which she really means 'Chinese and Taiwanese people have different standards of living'. She believes Taiwanese people to be more 'modern' and to enjoy a better quality of life. Placing this value of civilisation in hierarchical terms, Yuxin refuses to be called Chinese and 'does not want to have any relation with this term'.

Yuxin has derived her perception of China's hostility from school textbooks. She recalls that, when learning the modern history of the ROC in history class, she read: 'China [by which she means the CCP] started the civil war, drove the KMT out of China and to Taiwan, and still tried to attack us'. This CCP-KMT antagonistic discourse was the main theme in the KMT's version of history as presented in the textbook, and thus became one of the discursive bases for the China-Taiwan antagonistic discourse perceived by people like Yuxin. The new content of the primary school textbooks pertaining to the concepts of China and Taiwan may have also had a significant effect. First, as mentioned, while previous versions of textbooks grouped Taiwanese people within the supra-ethnic Chinese nationality or even into the idea of Chinese, the textbooks after 2000 do not tend to make this association. In textbooks before 1990, mainland China was introduced and described as one part of 'our country'. Maps titled

‘our country’ depicted both the continent and the island of Taiwan and painted the two regions with the same colour. The section on Taiwanese history in textbooks before 1990 was also framed within Chinese history. A portrait of Emperor Taizong (唐太宗) of the Tang Dynasty (599–649 AD) was juxtaposed with the text to emphasise that the history of Taiwan should be conceived as but one part of Chinese history (Figure 1-3). The textbooks from this period allocate large sections to introducing the history and geography of China up to 1945, often referring to ‘our country/nation’ both in titles and texts. In contrast, the textbooks after 2000 have eliminated all the Chinese history and geography and do not promote or emphasise the idea that the mainland is ‘ours’. Their maps rarely show the whole region of mainland China. If Taiwan and the mainland are drawn in the same map, they are often differently coloured. As a result, it is more likely for people of Yuxin’s generation than members of older generations to consider Taiwan and China as different countries, and Taiwanese and Chinese as two discrete generic ideas.

Defining ‘Chinese’ as *Waishengren*

Lan is another interviewee who holds the supra-ethnic view of Chinese nationality and the myth of the same origin—but she similarly hesitates to embrace Chinese identity. Her interview reveals her reluctance:

Q: There is a question that past research would usually ask: Do you think you are Chinese?

LAN: Probably not. ... Taiwanese are Taiwanese; I believe so inside my mind, and I think everyone would think so, too. You were born in Taiwan and would think of yourself as Taiwanese, but express that ‘we are also Chinese’.

Q: What do you mean by ‘express’?

LAN: You would say you are also Chinese, but inside you feel you were actually born in Taiwan (you are Taiwanese). That’s my thinking.

[...]

Q: What does 'Chinese' mean to you?

LAN: We were born in Taiwan, but we have the same bloodline with Chinese people. Chinese, Japanese and us have the same bloodline. No matter where we go, we have the same bloodline. The difference (from *waishengren*) is that our ancestors came to Taiwan much earlier.

Q: But you just said 'express' ... saying you are Chinese, too...

LAN: If a person of higher position, or a 'big' (high-ranking) official (大官) asks you, will you say you are Taiwanese? If big officials ask, we will say we are Chinese.

Three important characteristics of Lan's identity emerge in her account. First, despite her supra-ethnic conceptualisation of Chinese nationality, Lan identifies herself as Taiwanese, which implies that in her perception the idea of Chinese does not connect with the supra-ethnic category. Second, her Chinese identity is only displayed on certain specific occasions, as, for instance, when dealing with government officials. Third, the reason Lan rejects Chinese identity is because to her, on a daily basis, the term Chinese is used only to refer to *waishengren* and/or 'big government officials'. When asked about the difference between 'Chinese' and 'Taiwanese', Lan explains: 'One arrived in Taiwan early and the other came late'. Her statement thus reveals that when speaking of Taiwanese, Lan actually refers to the generic idea of those who arrived in Taiwan early, before 1945, that is, *benshengren*, while 'Chinese' refers in her mind to the latecomers, that is, *waishengren*.

Lan's strategic claim of Chinese identity in front of 'big government officials' as well as the connection she makes between 'Chinese' and 'big officials', again support my analysis of the close link between Lan's idea of Chinese and *waishengren*. Indeed, from the late 1940s to 1970s, most top officials were those who had come with the KMT. After Japan's defeat, officials from China were assigned to manage Taiwan, filling the governance vacuum left by Japan. Four years later, the whole ROC government was transplanted to the island, fleeing the Communist takeover on the mainland. This provincial-origin inequality in political power further led to a socio-cultural hierarchy in Taiwanese society and caused a sense of inferiority among the *benshengren* group. Many

researchers⁵⁰ have also suggested that the power disparity between *waishengren* and *benshengren* was one of the key factors in motivating the *benshengren* in support of political reforms in the 1980s.⁵¹ Coming from this historical context, Lan tends to associate these three ideas: Chinese, *waishengren*, and high-ranking officials. Her set of discourses of the concept ‘Chinese’ is therefore quite different from Haoping’s and Kaiwei’s, and reflects her life experience: To Lan, particularly on the basis of daily experience, the concept *waishengren* has greater credibility and capacity than the supra-ethnic Chinese nationality to represent the term ‘Chinese’. In her everyday usage, Chinese was detached from the idea of the supra-ethnic Chinese nationality and more connected with the idea of *waishengren*.

Another document, the text of Chang I-ching’s (張一青) speech published in the school magazine of National Taichung Girls Senior High School also reveals these common daily terminological usages, associating Taiwanese with *benshengren* and Chinese with *waishengren* at that time. Chang was the Chief Director of the Political Department of the 21st Division, ROC Army. His speech was made to senior high school students on the 21st of April 1947, after the occurrence of the 228 Incident.⁵² Representing the government’s position, the speech rejected demands for Taiwanese autonomy and ridiculed the idea that, in the words of autonomy advocates: ‘Taiwan’s affairs should be

⁵⁰ For instance, Lin Chia-lung, ‘Oppositional Movement under an Authoritarian-cientelist Regime: Social Base of the Democratic Progress Party, in *Taiwan: A Radical Quarterly in Social Studies* 2, no. 1 (July 1989), 117-144; Chang Mau-kuei, ‘Shengji wenti yu minzu zhuyi’ (‘The Provincial-origin Problem and Nationalism’), in *Zugun guonxi yu guojia rentong (Ethnic Relations and National Identity)*, edited by Mau-kuei Chang (Taipei: Yeqiang, 1993), 233–78; Wang Fu-chang, ‘Ethnic Assimilation and Mobilization: An Analysis of Party Support in Taiwan’, *Bulletin of the Institute of Ethnology Academia Sinica* 77, (June 1994), 1–34; and Wang’s ‘Consensus Mobilization of the Political Opposition in Taiwan: Comparing Two Waves of Challenges, 1979–1989’, *The Taiwanese Political Science Review* 1, no. 1 (July 1996), 129–210.

⁵¹ A more thorough discussion on the socio-cultural hierarchy based on the provincial-origin classification in Taiwanese society will be presented in Chapter 4: Cultural Hierarchies.

⁵² The 228 Incident was a large-scale resistance of people against the KMT government occurring in late February 1947, followed by military suppression and massacres. The incident is conventionally regarded as the most severe conflict between *waishengren* and *benshengren* groups in Taiwan history. See: Robert Edmondson, ‘The February 28 Incident and National Identity’. In *Memories of the Future: National Identity Issues and the Search for a New Taiwan*, edited by Corcuff, Stéphane (London and New York: M.E. Sharpe, 2002), 25–46, and Edward Vickers, ‘Frontiers of Memory: Conflict, Imperialism, and Official Histories in the Formation of Post-Cold War Taiwan Identity’. In *Raptured Histories: War, Memory, and the Post-Cold War in Asia* (Cambridge; London: Harvard University Press, 2007), 192–208.

handled by Taiwanese, and China's affairs should be handled by Chinese' (Figure 2-3).⁵³

Here, apparently, under the operation of this provincial-origin discourse, the word 'Taiwanese' refers to *benshengren* and 'Chinese' to *waishengren*.

Coping with Competition among Different Meanings/Discourses

Lan's interview shows two different discourses compete to define the idea of Chinese: one defines the concept as the supra-ethnic Chinese nationality, and the other equates it with *waishengren*. This discursive conflict appears not only in Lan's narrative but also in the accounts of other interviewees in my fieldwork. While Lan adopts a strategy of flexibility (changing her claim of identity according to different contexts), other interviewees presented in this section develop various tactics to deal with the discursive conflict.

Takala⁵⁴ is an 87-year-old (born in 1927) native Hakka. He was the eighth child of a peasant family in Miaoli County (苗栗縣). Perhaps because many of his older brothers and sisters were working to support the family, Takala was fortunately able to pay attention to his studies. He attended a teachers' university and became a teacher after graduation. He joined the KMT party very early (in 1950) because in that era party membership was necessary for advancement. Takala was quite proud of his consistent loyalty to the party, boasting that he had never voted for candidates of other parties. His teaching career was successful, and he eventually became a principal, a title he retired with.

Like Lan, Takala holds the idea of the supra-ethnic Chinese nationality and identifies himself as part of it. This identification can be observed in his usage of the

⁵³ The original phrase in Mandarin: '臺灣的事臺灣人管, 中國的事由中國人管'.

⁵⁴ 'Takala', he told me in the interview, was the name he used in primary school in the Japanese colonial period.

term ‘*zǔguó*’ (祖國; i.e., motherland), by which he refers to the sovereign who was going to take over Taiwan after the departure of the Japanese. For instance, when describing his poor impression of the first troops that the KMT government sent to take over Taiwan, Takala says it was because ‘*zǔguó*’ failed to consider that Taiwan had been fairly modernised and organised under Japan’s rule, and so should have sent someone prominent and qualified to take over its administration. And when speaking of the Japanese colonial education system in Taiwan, he says it is more rigorous than that of ‘*zǔguó*’. In any case, the usage of this term indicates that Takala thinks people of these two regions, mainland China and Taiwan, share the same ancestral heritage.

Nonetheless, Takala seems very reluctant to identify himself as Chinese. It seems that for him, *zǔguó* is a mere word, a term for a political entity of a particular era. He only uses it when describing the historical period of the 1940s, and he neither expresses any nationalist or patriotic feelings for the ‘motherland’, nor shows any form of nationalist aspiration in the interview. He just uses the word to refer to the government that took over Taiwan in 1945. Furthermore, Takala refuses to answer the question: ‘Do you think yourself as Chinese or Taiwanese?’ He answers evasively: ‘Our ancestors came from the mainland’; ‘Peasants [such as himself] would not have thought about this question’; ‘I’m too old to carefully deliberate this question’; and ‘Can you ask someone else?’ Eventually, with prompting by his son-in-law (who accompanied him during the entire interview), Takala admits that he rejects Chinese identity and identifies himself as Taiwanese only. To him, ‘Chinese’ means *lao-gong* (老共; literally, ‘old communists’), which refers to people of the PRC.⁵⁵

⁵⁵ The articulation between ‘communist’ and ‘Chinese’ reveals another discursive work on Takala’s perceptions of the term Chinese: the Cold War ideology. The KMT’s retreat to Taiwan in 1949 led to a distinct ideological divide across the Taiwan Strait. On the one side is the ROC regime, supported by the US, advocating free market and democratic political system (as the ruler claimed and called its ruling region as ‘Free China’ [*zìyóu-zhōngguó*; 自由中國]). On the other is the PRC regime, i.e., ‘Communist China’, supported by the USSR, promoting the planned economy and Leninist communism. Against this

Another interviewee is Mrs Liang, who was born in 1922 in Hualian County (花蓮縣), then a rather remote agricultural area on the east coast. Like Lan, she has been a subsistence farmer for most of her life, yet with more dramatic experiences. Liang was sent at a very young age to a peasant family to be adopted. She was abused in that family and soon escaped to seek shelter with her brother. Liang was married at the age of 21, and her husband proved to be an unemployed, irresponsible gambler. According to Liang, their youngest son did not even know that he had a father until the age of 6. Therefore, Liang had to work either in fields or in factories to raise her three children, one of whom had a slight mental disability. Her son's success testifies to her efforts; he was admitted to a teacher's school and became a high school teacher, and a few years was promoted to an official post in the education department of the Taiwan Provincial Government. Liang now has a granddaughter who is currently pursuing her PhD degree in the UK.

Liang responds to my enquiry about her Chinese and Taiwanese identities as follows:

Q: If someone asks you: 'Do you think of yourself as Chinese or Taiwanese', what is your opinion?

LIANG: Well, Chinese are good ... I would say so. Chinese are not bad, not dreadful.

Q: What do you mean by 'good'?

LIANG: It means ... some of them are good to Taiwan.

Q: Do you mean *waishengren*?

LIANG: Yes, yes. ... Well, how can you make a classification? How can you clearly make the distinction (between Chinese [*waishengren*] and Taiwanese [*benshengren*])? In my view, if you classify too clearly, there will be wars again.

Liang's account once again shows the close link between Chinese and *waishengren*.

Nevertheless, the commensuration of the two ideas does not keep her from claiming

background, the KMT government termed its counterpart regime '*guongfei*' (共匪; literally, communist bandits), labelling them as traitors who stole an entire country and caused people immeasurable suffering under their rule.

Chinese identity. Unlike Lan and Takala, Liang unflinchingly expresses her embrace of Chinese identity in the interview; and what she uses to legitimise her identity is the myth of the same origin:

Q: So, if someone asks you this kind of question and gives you five options, [...] what will you choose?

LIANG: Of course it is ... we are what we came from!

Q: You mean, if someone asks you this question, you will choose ... you are both Chinese and Taiwanese, right?

LIANG: Yes. We Taiwanese come from China. Our ancestors came from the mainland. We Taiwanese people are all ... well, most of us are *daluren* (mainlanders). The difference is the time when we came.

Q: So, Taiwanese are Chinese?

LIANG: Yes. The 'real' Taiwanese are only the Taiwanese aboriginals.⁵⁶

In short, Liang not only regards herself as one part of the supra-ethnic Chinese nationality but also identifies herself as Chinese, even though it seems very contradictory that she tends meanwhile to equate the idea of Chinese with the idea of *waishengren*, a social category she clearly does not belong to.

Anhui is a 79-year-old (born in 1935) Taiwanese born in Fengtian (豐田; also known as 'Toyota' in Japanese) in Hualien County.⁵⁷ Compared with Lan and Takala, Anhui apparently grew up in a wealthy family. She received education in the colonial period for only two years before the departure of the Japanese. She then passed examinations and went to high school in the 1950s. Anhui secured a job in the county

⁵⁶ The conceptualisation of Taiwanese aboriginals, particularly its origin, can be one index of the competition between Chinese nationalism and Taiwanese nationalism. In primary school textbooks before 1990, for instance, the Taiwanese aboriginals were deemed to have the same bloodline as Chinese people and thus were considered to be part of the Chinese nationality. Now it is widely argued that aboriginals may have Austronesian origins and are thus more closely related to those in the Philippines and the Pacific Islands than to those on the mainland. As the earliest settlers on the island of Taiwan, the aboriginals are titled the 'authentic Taiwanese'. Some Taiwanese nationalists highly appreciate Taiwanese aboriginals' culture, as they lend credibility to the uniqueness of Taiwanese culture and serve to distinguish it from the hegemonic Chinese culture. The aboriginal bloodline from Austronesia is also stressed to support the claim that the majority of people in Taiwan, whose ancestors immigrated to the island in the past four hundred years and thus assimilated with the aboriginals, are ethnically different from people in mainland China. See Michael Stainton, 'The Politics of Taiwan Aboriginal Origins', in *Taiwan: A New History*, edited by Murray A. Rubinstein (New York: M.E. Sharpe, 1999), 27–44.

⁵⁷ Fengtian was purposely designed as an immigrant village in the Japanese colonial period and thus had many Japanese residents at that time.

government after her graduation. She was then transferred to a police station, where she worked until she retired. Anhui married a *waishengren* who served in the army as a doctor; they met when he came to her house to treat her father's illness.

Anhui reports that during the Japanese colonial period, people in Taiwan did not use the term '*Zhongguoren*' (Chinese) in everyday life. Rather, they used a Japanese term 支那 (*shina*) to refer to the political entity across the Taiwan Strait. She says that all Taiwanese people during that period would identify themselves as Taiwanese only. People would not regard themselves as Japanese because there were clear differences between these two groups in terms of language, clothes, culture, living customs, and so on. Further, although Taiwanese people were using Han characters and practicing Han culture (when celebrating the Lunar New Year, for example), she simply did not care to associate herself with the concept of Hanren at that time. According to Anhui, in the period after the KMT came to Taiwan, people usually used the term 'Chinese' to mean *waishengren* and the term 'Taiwanese' to mean *benshengren*. These references/articulations appeared in her interview many times: She says that around the late 1940s and 1950s, native-born Taiwanese people had negative impressions of *waishengren* and would not allow their daughters to marry Chinese, that is, *waishengren*. She also says that the 228 Incident in 1947 resulted partly from people's anti-Chinese sentiments.

Anhui is probably the one subject who feels the greatest conflict and confusion when deciding whether to ascribe herself to the category of Chinese. The following interview reveals her emotional response:

Q: May I ask you one more question? Past research usually gives participants five options to describe their identities. Which would you choose amongst the options?

ANHUI: Now 'Taiwan' is China, *Zhonghua-minguo* (ROC). Thus Taiwanese have become Chinese.

Q: So, you would choose 'both Chinese and Taiwanese'?

ANHUI: Yes, we are Taiwanese, but we are also Chinese. I heard my grandfather say that we come from China ... Quanzhou (泉州).

Q: Do you think this kind of question ...

ANHUI: Very complicated! *I don't even know who I am, truly.* I'm Taiwanese. People living in Taiwan should be Taiwanese. That's all.

Q: Why is it complicated?

ANHUI: Because we are originally Taiwanese. But, *why* is there a China as well? So, we should be Chinese, right? We are now the citizens of Zhonghua-minguo (ROC), electing the president of the ROC. Therefore we should be Chinese.

Anhui's report suggests that her feelings of conflict arise when two elements of different discourses collide within their shared term, 'Chinese'. She never used to use the term 'Chinese' for her identity. It was rarely uttered during the Japanese colonial period; it referred neither to the citizens of Anhui's country nor to her ethnicity. In the first few years after the KMT took over Taiwan, 'Chinese' was used to refer to the *waishengren* group in the society. Soon, the term became able not only to designate the citizens of the country (ROC) but also to describe ethnicity (the supra-ethnic Chinese nationality). Her uneasiness and conflict thus result from her poor adjustment to the change of meanings of Chineseness, when the previously exclusive category (*waishengren*) became inclusive (denoting the supra-ethnic concept or the citizen of the ROC).⁵⁸

The conceptualised or perceived social classification between *waishengren* and *benshengren* influences not only the Chinese identity, as seen in the cases presented above, but also the Taiwanese identity of people in Taiwan. Matian is one example. His case is rare because he is the only two in this study to totally reject Taiwanese identity and identify himself as Chinese only.⁵⁹ He was born in Hubei Province, China in 1930.

Matian was abducted at the age of 12 to join the army of the Chinese Communist Party

⁵⁸ Some readers may be interested in the party affiliations of these elders of my fieldwork. The cases selected to present in the text, Lan, Takala, Ann and Liang, are all faithful KMT supporters.

⁵⁹ Almost all participants identify themselves as 'Taiwanese', and most give their reasons as 'I was born in Taiwan' or 'I have lived in this place for many years'. Nevertheless, some participants do express their reluctance and hesitation to claim Taiwanese identity for various reasons, one of which is the effect of the provincial-origin discourse.

(CCP) to fight against Japan's invasion. He was released when the war was over, but soon joined the KMT army in order to make a living. Matian retreated to Taiwan in 1948 with the KMT and married his wife (also from a *waishengren* background) in Taiwan in 1955. They lived in Taichung until he retired from the army in 1972; after that he made his living mainly by driving a taxi.

When asked about his Chinese and Taiwanese identity, Matian replies:

Q: Grandpa, do you feel there is a division between Chinese and Taiwanese in Taiwanese society?

MATIAN: There is. They call me 'Chinese', and they don't admit they are Chinese. [...]

Q: Why do they not call themselves 'Chinese'?

MATIAN: Taiwanese do not admit they are Chinese. They say Japanese are good because Japanese previously ruled them. I know that, and I have heard ... when I take them in the taxi. Sometimes I feel so angry and blame them. [...] I say, 'You have the mentality of a slave!' [...] I was enraged.

Q: This kind of people do not admit they are Chinese?

MATIAN: They don't. We used to have censorship of the press. Now it's all lifted. You should see Liberty Times. They promote *taidu* (臺獨; literally, Taiwan independence), and they are dividing (the society).

Q: So, Taiwanese are surely Chinese.

MATIAN: Of course; certainly Chinese. Do you know Hsieh Chang-ting (謝長廷)? He has a genealogy in his family! He changed (to deny his Chinese origin) after he seized some power. He is one of the DPP (Democratic Progressive Party, which includes advocating setting up a Republic of Taiwan in its party charter).

Q: Would you regard yourself as Taiwanese, grandpa?

MATIAN: I don't feel that way. I am *daluren* (mainlander), Chinese. I don't call myself Taiwanese. It is just the way it is, and I can do nothing about it. This is just what I feel. I left my home, my parents at the age of 13, 14. Now I am almost 90. I have been away for more than seven decades...

Matian's account once again shows that for some people in Taiwan, the idea 'Chinese' is firmly connected to *waishengren* and 'Taiwanese' to *benshengren*. In this sense, Chinese is only relevant in the context of ethnic and power relations within Taiwan. His articulation of these terms comes from the common usages in the surroundings of his early life, and these meanings of concepts are further reinforced by the emotion evoked in his daily practices. He feels that there is a clear distinction between Taiwanese (*benshengren*) and Chinese (*waishengren*) in the society and those who regard themselves as Taiwanese do not

recognize their Chinese identity. He has been put into the category of *waishengren* and is called ‘Chinese’ and ‘mainlander’ by others in daily life. In other words, he is not identified as Taiwanese by others and he would not identify himself as Taiwanese, either.

The tension between the *waishengren/benshengren* classification and the Chinese/Taiwanese identity is apparent in the minds of later generations, too. Sixty-year-old Chenli (born in 1954) is one example. As a *waishengren* like Matian, Chenli does not explicitly reject Taiwanese identity, but holds complicated feelings about the issue of identity. His father (born in Shandong Province, China) arrived in Taichung in the late 1940s, and soon moved to Kaohsiung City, working at the railway station. Chenli was born in that city in 1954, the fourth child in the family. Ever since graduating from high school, he has been working at a power station in Kaohsiung County. He is married to a *benshengren* wife and has two children, both of whom have degrees from high-ranking universities. In the interview, Chenli opts for dual identity, labelling himself as both Chinese and Taiwanese. He confesses that in the past he only identified himself as Chinese, because everyone claimed Chinese identity and no one would use the term ‘Taiwanese’ for identity at that time. Now, however, he considers himself Taiwanese due to having lived in Taiwan for so many years; the idea ‘Chinese’ seems more and more distant to him.

Chenli’s dual identity does not come easily to him. Rather than being sure of both Chinese and Taiwanese identities, he hesitates over them. Unlike many study subjects who would prioritise Taiwanese identity in their dual identity, he gives Chinese and Taiwanese identities equal weight. This, he explains, is partly because, when he was a schoolboy, *benshengren* despised him for his *waishengren* background. As for Chinese identity, he also expresses feelings of ambivalence over the ‘nationalist mandate’ to ‘be a proper Chinese’ that was conveyed to him in early education:

CHENLI: A bit conflictual... I felt conflicted myself, really. It's all messy and confusing as the times have changed. The background of the past time and that of the present seem to be ...

Q: Different?

CHENLI: Confusing... [...] When I was little, as you mentioned, we read about Chinese in our readings, and the history we read was mostly the history of *dalu* (the mainland), history of China. Now the volume of Taiwan history is increased (in the textbooks). The education we received was the history of China. It was just like the way some elders in Taiwan received Japanese colonial education. Now if you ask them if they want to be ruled by Japan, they would answer 'yes'. They would say they want to be Japanese; they don't want to be Chinese, to be Taiwanese. They are willing to be Japanese, to abandon Taiwan. Right, there are some elders who would be that way.

In addition, Chenli tends to use the term 'Chinese' to designate the people of the PRC. For instance, when I asked him what one could be proud of when being Chinese,⁶⁰ he replied that 'they' were determined and very efficient in making reforms; he praised the effectiveness of the PRC in completing major construction projects. More evidently, when talking about Taiwan independence, Chenli conceives of Taiwan as an already independent state. To him, China and Taiwan are two different countries.

These five participants along with Lan illuminate six different ways of dealing with the intense competition between the two discourses for the meaning of Chinese: one defines Chinese as the supra-ethnic Chinese nationality, and the other regards Chinese as equivalent to *waishengren*. In brief, when confronting the conflict, Lan deftly claims different identities in different contexts, Takala hesitates briefly and then rejects Chinese identity, Mrs Liang unflinchingly identifies herself as Chinese, Matian explicitly rejects Taiwanese identity, and Anhui and Chenli communicate uncertainty and confusion about their identities.

⁶⁰ The original phrase in Mandarin is '你覺得中國人有值得驕傲的地方嗎?'

Revisiting the Influence of Early Life Experiences

What factors cause these participants to develop different strategies to cope with the discursive conflict between competing discourses? The evidence suggests there is no single determinant cause. Neither gender, ethnicity, social status, residential location, nor age, for example, can plausibly account for it. The source of diversity can only be traced back to each individual's life experience. Chenli's formation and changes of identity could be a good example. The provincial-origin discourse first exercised its influence. As a *waishengren*, he did not refer to himself as Taiwanese when he was a schoolboy, and neither did the other people around him. Aside from daily usage of the term, Chenli also felt keenly different from *benshengren* classmates in terms of lifestyle, and also had negative experiences of exclusion by *benshengren* children. These events thus distanced Chenli from a Taiwanese identity. Meanwhile his passionately held Chinese identity, as he self-reports, was a result of the efficacy of Chinese nationalist education that the KMT fervently promoted. Later, however, he rethought this identity, realising that it had been constructed by the nation state for political purposes such as taking the mainland back.⁶¹ As for Taiwanese identity, Chenli's acceptance of the identity came very late, when the term 'Chinese' has been prevailingly used in Taiwanese society to designate the people of the PRC only, and the term 'Taiwanese', particularly praised in the development of Taiwanese nationalism. 'Being a Taiwanese' thus fills the identity vacancy created by the terminological change of Chinese. More precisely, it can be said that his acceptance of Taiwanese identity (and thus his misgivings about Chinese identity) comes from the development of Taiwanese nationalism in Taiwanese society.

⁶¹ In the interview, Chenli contrasted with some Taiwanese elders' embrace of Japanese identities to legitimate his Chinese identity construction.

Chenli's interview shows how individuals' life experiences influence their identity formation, and also how their life experiences may be forged and shaped by more general historic contexts, such as, in Taiwanese society, the provincial-origin conflict, and the development of Chinese and Taiwanese nationalism. Indeed, since the provincial-origin discourse seems adequate to reflect the significant social division (and to explain the disproportionality within Taiwanese society), and since both Chinese and Taiwanese nationalism were invoked by various camps of political elites, either as blueprints to build their ideal nation states or as tools to mobilise supporters, these discourses become more able than other discourses in the society to gather their subjects' beliefs and shape their worldviews.

The different meanings of Chinese and Taiwanese interpreted by my fieldwork participants from different generations in this chapter can be viewed as further evidence of this general, pervasive influence of the three discourses. Elderly participants such as Lan, Takala, Liang, Anhui, and Matian tend to associate the idea of Chinese with *waishengren* and Taiwanese with *benshengren*. Participants such as Chenli and Haoping, who received the KMT's Chinese nationalist education and learned much about the supra-ethnic Chinese nationality, tend to place Chinese in the supra-ethnic category. Younger people, such as Yuxin, understand Chinese simply as the people of the PRC. These differences in perception among different generations indeed correspond with the timing of the emergence of these discourses: while the provincial-origin discourse and Chinese nationalism prevailed in the early years from the late 1940s to the late 1980s, Taiwanese nationalism was not much highlighted until the 1980s. In fact, the statistical data from my fieldwork shows that half of those subjects aged under 20 (born after 1994) do not know what 'provincial origin' is, or else conceive of it very differently from the common-

sense understanding of the phrase. Only participants over 35 (born before 1979),⁶² and none under 35, would equate Chinese with *waishengren*. In other words, no one in the younger generation rejects Chinese identity due to equating it with *waishengren*; all of them reject the identity because they equate it with ‘people of the PRC’.⁶³

Nevertheless, while acknowledging the power of the provincial-origin discourse, Chinese nationalism and Taiwanese nationalism, my analysis does not give them exclusive control over identity. In other words, not all people in Taiwan (and their identity patterns) would be influenced by these discourses. Shuhui is an example. She is a 29-year-old (born in 1985), female hairstylist who was born in Pingtung (屏東), the agricultural southernmost county in Taiwan. Shuhui had a very unfortunate childhood. Her father had emotional problems and sometimes committed violent acts against her mother. Shuhui attended many primary schools and stayed in an orphanage for a time to escape from the fury of her father. Partly for the same reason, she left her hometown for Taipei at the age of 13 to learn hairdressing at a vocational school. As a result, Shuhui was less diligent about her studies than other children of the same age, and so lacked a grounding in the context of basic textbooks. She worked at various hair salons before age 20, and now owns her own shop in the East District in Taipei, the most popular district in the city. As a professional hairstylist, Shuhui actively seeks fashion information and pays heed to entertainment news and dislikes more serious reading matter and television programs. In her spare time, she enjoys shopping and hanging out with friends. She is by her own account a ‘sentimental’ person rather than a person inclined to ‘cerebral’

⁶² Age 35 is a very arbitrary division made according to the results of my fieldwork; the selection of this age has neither any statistical significance nor validity with respect to the general situation in Taiwanese society.

⁶³ My argument does not suggest that generation is a determinative factor to predict Chinese/Taiwanese identity. As presented in the text, elder participants may use various strategies to claim their identities. In the following chapters I also present findings concerning younger participants who have doubts about Taiwanese identity.

thinking. She once had a boyfriend who worked in China, and went there several times with him.

Two factors—the lack of a typical education during childhood and a preference for entertainment and fashion news—seem to have rendered Shuhui impervious to the influence of the ‘hard’ nationalist discourses, whether Chinese or Taiwanese, since, arguably, these nationalist discourses mainly exercised their influence through education and political promotion in the news media. For instance, Shuhui has never heard of the concept of the supra-ethnic Chinese nationality, and she does not think that Taiwanese and Chinese have common ancestors:

SHUHUI: It might be, but I am not sure. They might have come to Taiwan a long, long time ago. Yet, I feel... we have different accents. If that [having common ancestors] is true, we should have the same way of speaking, shouldn't we? And, our writing is different; the characters we use are different. Thus, I think we possibly don't have a common ancestor.

Besides the ethnic/ancestral discourse, Shuhui is also free from the influence of cultural discourses of Chinese nationalism which aim to include all the ethnic minorities sharing similar cultural factors, such as language or customs, into the supra-ethnic Chinese nationality. She thinks Chinese and Taiwanese speak different languages: the former use Mandarin (generally known as ‘Chinese language’ and conventionally known as *guoyu*, [國語; national language] in Taiwanese society), while the latter use Taiyu (臺語, Taiwanese local language/dialect). She is unaware that Taiyu is actually a form of *Minnan*, a language from South Fujian Province, China, and thus does not regard Taiyu as a dialect of Chinese. She knows that the official language of Taiwan is Mandarin, but does not think of it as ‘China’s’ language. She perceives many differences between the Mandarin used in China and that used in Taiwan: the tones are different, the accents are different, and the characters are different, and the way people phrase sentences is different. Likewise, Shuhui does not think that the Lunar New Year celebrated in Taiwan

is Chinese (China's). She thinks that the holiday is a global event: everyone in every country of the world can celebrate Lunar New Year, as is the case with the Gregorian New Year and Christmas. The Gregorian New Year does not belong to any country; so neither does the Lunar New Year, in her view.

Thus, Shuhui conceptualises contemporary Asian ethnicities and nations entirely based on her own experience, from what she has gleaned from travelling abroad, or from entertainment news stories. For example, she draws the idea '*huaren*' from television, where the term is used to refer to Mandarin singers or actors in and filmmakers of Mandarin movies. By this definition, Chinese, Taiwanese, Hong Kong residents, Malaysians, and Singaporeans are all *huaren*.⁶⁴ However, Shuhui does not equate the term '*huaren*' with 'China'. To her, China is a foreign country separate from Taiwan, not only because she perceives many differences between Taiwanese and Chinese people and cultures, but because she has to travel on planes and pass through customs on both sides when she travels to China. 'China' is to her just like the United States of America, Japan, Korea, or Italy, and the concept of 'Chinese' is just like American, Japanese and so on, all of them referring to 'foreigners' who are distinct from Taiwanese. Thus, Taiwanese are not Chinese, just as they are not American or Japanese. More surprisingly, Shuhui views 'Hong Kong people' in the same way: people from Hong Kong use different characters and speak a different language or dialect. Therefore, Hong Kong people are not Chinese, either. In fact, she knows that Hong Kong is now governed by the PRC, but still does not feel that Hong Kong people are Chinese and would not call them Chinese.

Further, Shuhui has never heard of and has no idea about 'provincial origin'. She does not really know what *waishengren* and *benshengren* mean, but vaguely gathers that *waishengren* might refer to the mainlanders while *benshengren* refers to native Taiwanese

⁶⁴ As for '*Hanren*', Shuhui considers the term to refer to ancient people in China and would not regard herself as such.

people. To her, provincial origin seems to be a rarely used demographic classification, and not an important index by which to understand the current social and political conditions of Taiwanese society. It can thus be said that the discourse of provincial origin barely influences her Chinese/Taiwanese identity.

Shuhui's case is exceptional and can hardly be taken as representative of typical Taiwanese people where Chinese and Taiwanese identity is concerned. Nonetheless, her example demonstrates how individuals who lack a concept of provincial origin and possess little of the conventional knowledge inculcated by Chinese and Taiwanese nationalism might perceive the ideas of 'Chinese' and 'Taiwanese', and how they might form their particular identities. Her unequivocal espousal of Taiwanese identity and her rejection of Chinese identity do not come from the operation of Taiwanese nationalist discourses in the society but, rather, her own personal experiences of encountering the Chinese people in China and forming perceptions of difference between herself and the people across the Strait. Shuhui's report, as an exception to my theory, once again manifest the significant influence of individual life experience, and has also in opposite contrary way proved the important effect of the provincial-origin discourse, Chinese nationalism, and Taiwanese nationalism on most Taiwanese people's Chinese/Taiwanese identity.⁶⁵

⁶⁵ Some readers may suppose that since Shuhui is a member of a relatively young cohort of my fieldwork who is living in the period when Taiwanese nationalism has emerged and been fervently discussed, her perception of the concepts of Chinese and Taiwanese must be influenced by exposure to Taiwanese nationalist discourses. However, this argument gives far too much weight to the influence of Taiwanese nationalism and asserts far too direct a causal link between this nationalism and Shuhui's identity. This is because Shuhui seems significantly free from the influences from education and political propaganda, the two major facilities used by nationalist discourse, the connection between her identity and Taiwanese nationalism should be indirect. In other words, her identity is the result of changing social situations that have also contributed to the emergence of Taiwanese nationalism; this is not to say that her identity and perceptions of Chinese and Taiwanese are a direct product of Taiwanese nationalism.

Conclusion: Meaning, Discourse, and Identity

This chapter addresses the first, and probably the most fundamental aspect of identity in my theory: meaning. Taking Chinese identity as the main example, the chapter dismantles the concept of Chinese into several significant social meanings and discourses, such as discourses of racial phenotype, ethnic origin, common language, shared culture and history, and the discourse of provincial-origin, as well as other generic concepts such as the supra-ethnic Chinese nationality (*Zhonghua-minzhu*), *Hanren*, *huaren*, *dongfangren* (Easterners), the citizens of the PRC, and *waishengren*. These meanings and discourses are aggregated (mutually articulated) to form a general domain of discourses, or in Foucault's words, an individualisable group of statements (different discursive sets) that can all be called 'Chinese'. Often, one of the meanings or discourses becomes salient and has the power to represent a person's definition of Chinese (*Zhonghua-minzhu* in Haoping's and Kaiwei's cases, the people of the PRC in Yuxin's case, and Chinese communists in Takala's case). This is often the result of the duel between two or more discourses for the representative authority. Individuals develop various strategies to deal with the discursive conflict (in the cases of Lan, Takala, Liang, and Anhui, for instance).

My research also points to the perceptions of similarity and impressions as a means of articulating elements in the formation of these discursive sets. That is, individuals form their conceptions of Chinese, Taiwanese, and other generic categories not entirely according to logical thinking or objective ethnologic knowledge but also by perceptions of similarity. This mechanism of articulating from perceived similarities thus can explain the malleable and metonymic characteristics of generic concepts. However, these concepts are not forged and shaped arbitrarily; rather, they are regulated by certain rules and structures (for instance, the nationalist discourses), and shaped by the subject's early life experiences—that is, culture, discourses, knowledge and information that the

subject acquires from their surroundings. These discourses and knowledge can be conveyed in the content of national education, pop culture, street talks, and so forth. Sometimes certain popular discourses influence dominantly (e.g. Chenli's identities changed along with the development of the provincial-origin discourse, the KMT's Chinese nationalism and Taiwanese nationalism); sometimes individuals' life experiences pre-empt the significant role (like Shuhui's case).

However, exploring the function of discourse on identity formation is the first step of the analysis. What is not clear is why and how some discourses may particularly have the power to interpellate identifying subjects in their life courses? Put it differently, what triggers the identifying subject to select a specific meaning or discourse of the identified object among various choices? I contend that values are the key factor, as presented and discussed in the following chapters.



Figure 2-1: Picture in the primary school textbook (social studies), versions before 1985, Volume 7, Unit 2 'Tracing Our Roots' (追尋我們的根).



Figure 2-2: Portrait of Emperor Taizong of the Tang Dynasty (599-649 AD) in a primary school textbook (social studies), versions before 1985, Volume 7, Unit 3, 'Taiwan's Old Stories' (多少臺灣舊事).

謂「政治不民主，人民不自由，」說得天花亂墜，而政府還政於民的舉
 一般純潔的青年，尤其是富有愛國心的青年學生，就在他們的欺騙宣傳
 流為被人利用，不知持此論的陰謀家，實際上他們祇知道個人利益，而
 家沒有放在腦海裡，他們的心目中，不知有國，自然也談不到愛國，以
 嚴正的態度來對付。

次事變當中，我們聽到有一部份人，要求臺人治臺，這種要求，在
 意的向政府陳述意見，我個人認為是無可厚非的，但乘暴動威脅政府
 的事臺灣人管，中國的事由中國人管」那簡直太不對了，說這些話的
 種人，一種是毫無國家觀念的共產黨徒，一種是想藉此機會來佔幾席
 既然大家都是中華民族的子孫，外省同胞當然可以來臺灣服務，臺胞
 加建國工作，怎麼能自劃鴻溝，分出彼此呢？各位青年同學，應該明
 切愛護國家，糾正錯誤的自由觀念，貢獻力量為國家謀遠大的光榮！
 第三，要養成良好的德性「我們要國家富強，民族發揚光大，沒有良好
 的，尤其各位是女青年，更須要特別講究。」

23 10:54 AM

Figure 2-3: Speech text of Chang I-ching (張一青; the Chief Director of the Political Department of the 21st Division, ROC Army) published in the school magazine of National Taichung Girls Senior High School in 1947. The speech was made on the 21st of April in the same year.

Appendix II: Contents of Social Studies School Textbooks in Different Periods

Versions before 1990

Volume 1: School and Classmates

Unit 1: Our School; Unit 2: Everybody Celebrates (National Holidays);

Unit 3: My Favourite Activities; Unit 4: Celebrating New Year.

Volume 2: Family and Neighbours

Unit 1: Our Family; Unit 2: Memorial Dates in Spring;

Unit 3: Good Neighbours; Unit 4: Happy Holidays.

Volume 3: Hometown and Customs

Unit 1: Scenes in Hometown; Unit 2: Town Scenes;

Unit 3: Town Customs; Unit 4: Stories of Noblemen.

Volume 4: Community Organization

Unit 1: Our Autonomous Community; Unit 2: Enthusiastic Community People;

Unit 3: Community Construction; Unit 4: New Face of Autonomous Community.

Volume 5: Community Development

Unit 1: *Zifa* Community of Farm Villages; Unit 2: *Ziqiang* Community of Fish Villages;

Unit 3: *Zili* Community in the Mountain Area; Unit 4: *Zixi* Community in the Urban Area.

Volume 6: Life and Resources

Unit 1: Our Food; Unit 2: Our Clothes; Unit 3: Our Houses; Unit 4: Our Transportation.

Volume 7: Taiwan and the Mainland

Unit 1: Beautiful Island; Unit 2: Tracing Our Roots;

Unit 3: Taiwan's Old Stories; Unit 4: Two Great Men Restoring Taiwan.

Volume 8: Building up and Reviving the Nation

Unit 1: Great Government; Unit 2: Peaceful and Flourishing Society;

Unit 3: Healthy and Happy Living; Unit 4: Accomplishments of the National Revival Plan.

Volume 9: Territory and People

Unit 1: Geographic Foundation of China; Unit 2: Origin and Assimilation of Nationality;

Unit 3: Chinese Philosophers; Unit 4: Science and Technology of the Chinese People.

Volume 10: Nationality and Culture

Unit 1: Living Environments of Chinese People; Unit 2: Ethnic Groups of the Chinese People;

Unit 3: Political Traditions of the Chinese People; Unit 4: Patriotism of the Chinese People.

Volume 11: Modern China

Unit 1: Radical Changes in Modern China; Unit 2: Establishment of the Republic;

Unit 3: Revival of the Nation; Unit 4: Execution of the Three People's Principles.

Volume 12: The World and China

Unit 1: From Prehistory to the Present; Unit 2: The World Today;

Unit 3: Earth and Space; Unit 4: Create the New Era.

Versions between 1990 and 2000

- Volume 1: Unit 1: Our School; Unit 2: Lovely Family; Unit 3: Good Living Habits.
- Volume 2: Unit 1: Happily Study; Unit 2: Everyone Safe and Well; Unit 3: Happy Holidays.
- Volume 3: Unit 1: I'm Growing Up; Unit 2: Getting along with Others; Unit 3: Group Life.
- Volume 4: Unit 1: Our Customs; Unit 2: The Place We Live; Unit 3: People Serving Us.
- Volume 5: Unit 1: Class Autonomy; Unit 2: Learning Together; Unit 3: We Are Good Friends.
- Volume 6: Unit 1: Knowing Our Hometown; Unit 2: Caring for Our Hometown;
Unit 3: People in Various Careers.
- Volume 7: Unit 1: The Geographic Environment of Taiwan; Unit 2: Taiwan's Natural Resources and Their Utilization; Unit 3: Development in Taiwan.
- Volume 8: Unit 1: Inventions and Life; Unit 2: Traditions and Life; Unit 3: Life with Order.
- Volume 9: Unit 1: Living Environments of *Zhonghua-minzu*; Unit 2: Assimilation of *Zhonghua-minzu*; Unit 3: Establishment of the Republic of China.
- Volume 10: Unit 1: Economic Development; Unit 2: Changes in the Society; Unit 3: Achievements of the Chinese People.
- Volume 11: Unit 1: Our World; Unit 2: Cultural Exchange between China and the West; Unit 3: Traditional Values and the Changing Society.
- Volume 12: Unit 1: Democratic Society with Rule-of-Law; Unit 2: Our Village Earth.

*Versions after 2000*⁶⁶

- Volume 1: Unit 1: Open Your Mind; Unit 2: Happy Together; Unit 3: Cultural Profile of Community.
- Volume 2: Unit 1: I Know How to Use Money; Unit 2: I Grew Up This Way;
Unit 3: When We Are Together.
- Volume 3: Unit 1: Hello! Hometown; Unit 2: Nostalgic Song; Unit 3: Our Hometown Our Love.
- Volume 4: Unit 1: Transportation, Resources and Life of Hometown; Unit 2: Changes of Life;
Unit 3: New Face of Hometown.
- Volume 5: Unit 1: Beautiful Formosa; Unit 2: Conversation between People and Land;
Unit 3: Love Customs of Taiwan.
- Volume 6: Unit 1: Economy and Life; Unit 2: Politics and Life; Unit 3: Law and Order and Life.
- Volume 7: Unit 1: Taiwan's History; Unit 2: Change of Life Styles in Taiwanese Society;
Unit 3: An Exhibit of Taiwanese Culture.
- Volume 8: Unit 1: Seeing the World; Unit 2: The Long Development of Village Earth;
Unit 3: Set Out Again, Taiwan.

⁶⁶ School textbooks were allowed to have multiple versions and to be edited by private publishers after 2000. Here I only chose the version published by Nan-I (南一) as an example. Moreover, primary schools do not teach social studies until the third grade. Textbooks of social studies thus have only eight volumes.

Feelings

Introduction

Meanings of generic terms provide various positions that members of a society are able to claim for themselves or ascribe to others. This is only the basic facet of identity: a generic label of a certain classification system; neither it shows the entire picture of identity nor explains how identity really functions—for example, by encouraging people to actively claim a specific identity, by provoking the emotions of people subjected to such identities, and by obliging or mobilising them to commit certain actions. This thesis argues that only categories associated with other discourses have the potential to bring identity into full play; while an emotional discourse can ascribe fervent affective features to an identity, a value-oriented discourse can further prompt identifying subjects to take specific actions. Accordingly, this chapter presents two emotionally charged discourses that influence the formation of Chinese and Taiwanese identities in Taiwan. The first is imagined nostalgia, a discourse that rouses sentimental longing for the past—in this study's case, particularly in terms of one's Chinese identity. The second is ethical narrative, a discourse that in being both emotion- and value-oriented is able to not only excite audiences' strong emotional responses, but moreover oblige them to take certain actions.

Current scholarship has both involved and precipitated exceptionally rich research on issues related to emotions in various disciplines of social science, including political science,¹ international relations,² philosophy,³ and ethics.⁴ Likely in order to

¹ For instance, David P. Redlawsk, *Feeling Politics: Emotion in Political Information Processing* (New York: Palgrave Macmillan, 2006); Eugene Borgida et al (eds), *The Political Psychology of Democratic Citizenship*

fulfil the mission of challenging the hegemony of traditional perspectives on rational choice, most of this research has earnestly endeavoured to elucidate the interaction between cognition and emotion. Citing a range of different views on the mechanism, W. Russell Neuman in his book, *The Affect Effect: Dynamics of Emotion in Political Thinking and Behaviour*, has listed 23 theories, models, or central concepts and classified them into four types.⁵ The first is cognitive primacy, which underscores ‘a direction of influence from cognition to affective state’.⁶ Appraisal theory in Richard Lazarus’ work,⁷ Rom Harre’s theory of social construction of emotion,⁸ and the concepts of selective attention and selective exposure⁹ can be regarded as this approach. The second is affective primacy, which by contrast stresses ‘the critical importance of the affective state on the level and character of subsequent attentiveness to various stimuli’.¹⁰ Joseph Forgas’ affect infusion model,¹¹ George Marcus’ affective intelligence theory,¹² Robert Zajonc’s affective

(Oxford University Press, 2009); John Protevi, *Political Affect: Connecting the Social and the Somatic* (University of Minnesota Press, 2009); Bernard Yack, *Nationalism and the Moral Psychology of Community* (University of Chicago Press, 2012); Cristian Tileagă, *Political Psychology: Critical Perspectives* (Cambridge University Press, 2013); David Patrick Houghton, *Political Psychology: Situations, Individuals, and Cases* (Routledge, 2014).

² For instance, Neta Crawford, ‘The Passion of World Politics’, *International Security* 24 (Spring 2002): 116–154; Rose McDermott, *Political Psychology in International Relations* (University of Michigan Press, 2004); Jonathan Mercer, ‘Human Nature and the First Image’, *Journal of International Relations and Development* 9 (September 2006): 288–303; Andrew Ross, ‘Comin in from the Cold: Constructivism and Emotions’, *European Journal of International Relations* 12 (June 2006): 197–222; and Todd Hall, ‘Sympathetic States: State Strategies, Norms of Emotional Behaviour, and the 9/11 Attacks’, *Political Science Quarterly* 127, no. 3 (October 2012): 369–400.

³ For instance, Antonio R. Damasio and Elwin Marg, *Descartes' Error: Emotion, Reason, and the Human Brain* (New York: Avon Books, 1994); Randall Collins, *Interaction Ritual Chains, Princeton Studies in Cultural Sociology* (Princeton University Press, 2004); Robert C. Solomon (ed), *Thinking about Feeling* (Oxford: Oxford University Press, 2004).

⁴ For instance, Jesse Prinz, *The Emotional Construction of Morals* (Oxford University Press, 2007); Joseph Duke Filonowicz, *Fellow-feeling and the Moral Life* (Cambridge: Cambridge University Press, 2008); and James E. Fleming (ed), *Passions and Emotions: Nomos Liii* (NYU Press, 2012).

⁵ W. Russell Neuman, *The Affect Effect: Dynamics of Emotion in Political Thinking and Behaviour* (University of Chicago Press, 2007).

⁶ *Ibid.*, 16.

⁷ Richard S. Lazarus, ‘Progress on a Cognitive-motivational-relational Theory of Emotion’, *American Psychologist* 46, no. 8 (August 1991): 819–34.

⁸ Rom Harre (eds), *The Social Construction of Emotions* (Malden, MA: Blackwell, 1987).

⁹ David O. Sears and Jonathan L. Freedman, ‘Selective Exposure to Information: A Critical Review’, *Public Opinion Quarterly* 31, no. 2 (Summer 1967): 194–213.

¹⁰ Neuman, *The Affect Effect*, 16.

¹¹ Joseph P. Forgas, ‘Mood and Judgment: The Affect Infusion Model (AIM)’. *Psychological Bulletin* 117, no. 1 (1995): 39–66.

¹² George E. Marcus, W. Russell Neuman, and Michael MacKuen, *Affective Intelligence and Political Judgment* (University of Chicago Press, 2000).

primacy theory,¹³ the concept of affective priming in John Bargh and his colleagues' research,¹⁴ Petty and Cacioppo's elaboration likelihood model,¹⁵ and Sears' symbolic politics are the studies of this vein. The third type—that is, linkage models and subliminal linkage models—does not imply the particular primacy of either of the above influences when modelling mechanisms of interaction between cognition and affect. Theories of this approach are, for example, Robert Abelson's concept of hot cognition,¹⁶ Russell Fazio's automaticity of affect,¹⁷ Deutsch and Gerard's dual process model,¹⁸ Shelly Chaiken's heuristic/systemic model,¹⁹ and Spezio and Adolfs' recurrent multilevel appraisal model.²⁰ Finally, models of functional form 'include theories that emphasise asymmetries and nonlinearity in models of interaction'.²¹ The idea of negativity bias and that of positivity offset discussed in John Cacioppo and his colleagues' works,²² and the Yerkes-Dodson model are categorised in this vein.²³ Of these four types, the approach in this thesis can be categorised as one of Neuman's (subliminal) linkage models, since it does not tend to engage in debating whether cognition or emotion has the upper hand.

¹³ Robert B. Zajonc, 'On the Primacy of Affect', *American Psychologist* 39 (1984): 117–24.

¹⁴ John A. Bargh, et al., 'The Automatic Evaluation Effect: Unconditional Automatic Attitude Activation with a Pronunciation Task', *Journal of Experimental Social Psychology* 32 no. 1 (1996): 104–128.

¹⁵ Richard E. Petty and John T. Cacioppo, *The Elaboration Likelihood Model of Persuasion* (Springer New York, 1986).

¹⁶ Robert P. Abelson, 'Computer Simulation of "hot cognitions"', in *Computer Simulation of Personality*, edited by S. Tomkins and S. Messick (New York: John Wiley, 1963).

¹⁷ Russell H. Fazio, 'On the Automatic Activation of Associated Evaluations: An Overview', *Cognition & Emotion* 15, no. 2 (March 2001): 115–141.

¹⁸ Morton Deutsch and Harold B. Gerard, 'A Study of Normative and Informational Social Influences upon Individual Judgment', *The Journal of Abnormal and Social Psychology* 51, no. 3 (1955): 629–36.

¹⁹ Shelly Chaiken, 'Heuristic versus Systematic Information Processing and the Use of Source versus Message Cues in Persuasion', *Journal of Personality and Social Psychology* 39, no. 5 (November 1980): 752–66.

²⁰ Michael L. Spezio and Ralph Adolphs, 'Emotional Processing and Political Judgment: Toward Integrating Political Psychology and Decision Neuroscience', in *The Affect Effect: Dynamics of Emotion in Political Thinking and Behavior*, edited by W.R. Neuman (University of Chicago Press, 2007): 71–95.

²¹ Neuman, *The Affect Effect*, 16.

²² Please see John T. Cacioppo and Gary G. Berntson, 'Relationship between Attitudes and Evaluative Space: A Critical Review, with Emphasis on the Separability of Positive and Negative Substrates', *Psychological Bulletin* 115, no. 3 (May 1994): 401–23; and John T. Cacioppo and Wendi L. Gardner, 'Emotion', *Annual Review of Psychology* 50, no. 1 (1999): 191–214.

²³ Robert M. Yerkes and John Dodson, 'The Relation of Strength of Stimulus to Rapidity of Habit-Formation', *Journal of Comparative Neurology and Psychology* 18 (1908): 459–482.

Instead, this chapter aims solely to explicate the two particular, crucial mechanisms to demonstrate how emotions can be aroused as part of identity construction.

Past research on the relation between feelings and (national) identities can be roughly classified into two approaches.²⁴ The first, which I call the ‘socio-psychological approach’, borrows from current sociological and psychological concepts and theoretical frameworks to explain people’s affinity for a certain group or community.²⁵ Joshua Searle-White’s work *The Psychology of Nationalism* is an exemplary analysis,²⁶ in which nationalist affections are considered to be types of ‘predictable attitudes and thinking patterns’ based on the distinction between two significant psychological concepts: ‘in-group’ (the groups people belong to) and ‘out-group’ (the groups they do not belong to).²⁷ In brief, people are inclined to form positive feelings for the in-group (‘in-group favouritism’) and accept negative stereotypes about the out-group (‘out-group devaluation’). These feelings for a group or community are aroused, as the author suggests, due to the operation of identification. By identifying with a particular group, we tend to feel that the ‘group becomes a part of us’.²⁸ Searle-White believes that it is human nature to strive for a positive sense of oneself (a positive sense of identity), and

²⁴ It can be argued that there is a third approach, based on psychoanalysis, which utilises Sigmund Freud’s concepts of ‘mourning’ and ‘melancholy’ and theorises them as the primitive emotions that arise due to the constitutive ‘loss’ when subjectivity is formed. More detailed studies, theoretical and empirical, can be found in: Judith Butler, *The Psychic Life of Power* (Stanford University Press, 1997); David L. Eng and David Kazanjian, *Loss: The Politics of Mourning* (University of California Press, 2003). Although it could be implied that those who hold fervent nationalist sentiments (nationalist subjects) should experience feelings of mourning or melancholy for the mother country/nation they feel passionately about, this is outside the scope of my research, which in any case found no direct or solid evidence of such emotions among my fieldwork subjects. Moreover, although Melissa Gregg and Gregory J. Seigworth suggest in *The Affect Theory: Reader* (Durham, NC: Duke University Press, 2010) at least eight approaches for research on feelings, for the sake of brevity, I have opted to classify past research into only the above-mentioned three approaches in order to focus the discussion on questions of group identity.

²⁵ See, for example: Martha Cottam et al., *Introduction to Political Psychology* (Mahwah, New Jersey: Lawrence Erlbaum Associates, Inc., 2004); John Jost and Jim Sidanius, *Political Psychology* (New York and Hove: Psychology Press, 2004); David P. Redlawsk (ed), *Feeling Politics* (2006); and Bernard Yack, *Nationalism and the Moral Psychology of Community* (2012).

²⁶ Joshua Searle-White, *The Psychology of Nationalism* (New York: Palgrave, 2001).

²⁷ *Ibid.*, 12.

²⁸ *Ibid.*, 51.

nationalism ‘gives us the opportunity to feel moral, right, and just’.²⁹ ‘National narratives’—that is, ‘shared stories of the origin and experiences of our people’—play a key role in this mechanism because it is a primary way ‘in which we envision this connection between us and the other members of our nation’.³⁰

The other approach, which I call the ‘culturalist approach’, has come into the spotlight in the wake of the ‘cultural turn’, a new research paradigm in social science that emerged in the late twentieth century, focussing primarily on the constitutive role of culture.³¹ This approach rejects the view that culture is merely a product of the nation/state; rather, it emphasises the capacity of culture to shape the nation/state and of ‘causal flows running in both directions’ (from culture to state and vice versa).³² For instance, the work of Julia Adams argues that the culture of worshipping genealogies of privilege and the continuity of proprietor families gives patrimonial elites in pre-modern Europe the potential not only to identify themselves as representatives and future descendants of long-dead ancestors, but also to generate vehement emotions for the collective of elite patrilineages that is bounded by the familial discourse.³³ These identifications and feelings of patrilineage forged and consolidated these envisioned families and then consolidated them in what Adams terms ‘familial states’. As a further example, Mabel Berezin’s work illustrates how Italian fascists of the 1920s used public religious rituals,³⁴ the popular culture of love affairs, and the image of the mother in Italian society to evoke people’s political emotions and to construct their national identity. The study by Vanessa Fong, undertaken in a Chinese context, is yet another

²⁹ Ibid., 87.

³⁰ Ibid., 53.

³¹ Detailed discussions can be seen in the work of George Steinmetz, *State/Culture: State Formation After the Culture Turn* (Ithaca; London: Cornell University Press, 1999).

³² Ibid., 3.

³³ Julia Adams, ‘Culture in Rational-Choice Theories of State Formation’, in *State/Culture: State Formation After the Cultural Turn*, edited by George Steinmetz (Ithaca; London: Cornell University Press, 1999), 98–122.

³⁴ Mabel Berezin, ‘Political Belonging: Emotion, Nation and Identity in Fascist Italy’, in *State/Culture*, edited by George Steinmetz.

example.³⁵ Taking Chinese patriarchal family culture on board, she coins the concept ‘filial nationalism’ to refer to a particular nationalist ideology that is ‘based not on the idea of an imagined community, but on the idea of an imagined family, in which China was identified with a long-suffering parent who, despite her flaws, deserved the filial devotion of her children’.³⁶

My analysis takes elements of both of these approaches into consideration. The reason is that, first, while the culturalist approach does not particularly emphasise feelings, either positive or negative, for generic categories of people, some participants in my fieldwork indeed expressed this type of affection for the Chinese or Taiwanese group. Second, the problem of the socio-psychological approach is that, in trying to explain nationalistic feelings using the conceptual dichotomy between ‘in-group’ and ‘out-group’, it essentialises this account rather too assertively. In fact, people are capable of experiencing a variety of feelings towards a generic group: they can have some negative emotions about their in-group and some positive images of their out-group. Although it can be argued that people are obliged to generate positive feelings for the group they belong as ‘in-group favouritism’ implies, it is not necessary to suggest that people will definitely have exclusively negative feelings towards out-groups. In other words, emotions are aroused in a more complicated way than the in-group-versus-out-group theory suggests; feelings are not determined purely by how groups or subjects are categorised.

³⁵ Vanessa Fong, ‘Filial Nationalism among Chinese Teenagers with Global Identities’, *American Ethnologist* 31, no. 4 (November 2004), 631–48.

³⁶ Ibid: 632. Also, the work of Jan Willem Duyvendak, *The Politics of Home: Belonging and Nostalgia in Western Europe and the United States* (Basingstoke: Palgrave Macmillan, 2011), can be another example of this approach. The author explicitly shows that among different cultures, people in Western Europe and those in the Americas, for example, have different conceptualisations of nostalgic feelings: the former experiences a sense of longing for the old, homogeneous neighbourhood without many foreign immigrants, whilst the latter is more inclined to have a wistful affection for traditional family values of the past. However, my research does not refer to this view because the nostalgic feelings that we are dealing with are quite different.

In that sense, the question then becomes how feelings are aroused to facilitate identity construction. Based on empirical evidence from my fieldwork,³⁷ this thesis aims to offer two theories. On the one hand, the theory of imagined nostalgia explains that people's sense of belongingness to in-groups originates from their sense of familiarity upon re-encountering old objects or past experiences. On the other, the theory of ethical narrative holds that positive feelings for in-groups and negative ones for out-groups are indeed constructed in a primitive narrative of moral dualism, which depicts out-groups as immoral antagonists that oppress the virtuous in-group. This explains that not a generic label of in-group can successfully stimulate their members' feelings and inform their identities; with this moral-value-oriented discourse, an identity can truly acquire the capacity to master its subjects' feelings and in turn conduct their actions.

Imagined Nostalgia

The first type of emotionally charged value-oriented discourse presented in this chapter is 'imagined nostalgia', a discourse operating along with a sentimental longing for a place where the subject may never actually have been. The concept is also used by Dai Jinhua,³⁸ who in her study on contemporary Chinese films perceptively remarks:

A kind of familiar yet strange representation of history, a long repressed memory emerging from the horizon of history, through the repeated identification of contemporary Chinese history, allows people to receive consolation and gain a holistic, imagined picture of modernised China. In this picture, modernisation is no longer the miracle of the 1979 reform of an old China in decline but an always integral part of the history of China. [...] [T]he mesmerising allure of this picture is that it rebuilds a kind of imagined link between the individual and society, between history and the present reality, in order to provide a rationale

³⁷ In this chapter I discuss ten of my fieldwork cases. Their birth years and some basic demographic information (gender, ethnicity, and birthplace) along with selected significant historical events in Taiwan are listed on the timeline in Appendix I.

³⁸ Dai Jinhua, 'Imagined Nostalgia', *Boundary 2* 24, no. 3 (Fall 1997), 143–61.

for our contemporary struggle and to impart to us some sense of comfort and stability.³⁹

However, my analysis does not go so far as to impute particular functions of imparting a sense of comfort and stability to this imagined nostalgia. My research nevertheless does further dismantle the concept into its two major components: (1) nostalgic feeling and (2) imaginative construction. For one, the fundamental component of nostalgic feeling is a sense of familiarity: a wistful attachment to objects that remind people of past times and places. These nostalgic objects can be tangible, everyday items or abstract tales, scenarios, or sensory cues, including accents overheard, fragrances in the air, flavours of food or drink, or even sensations of temperature or moisture. This sense of familiarity reminds individuals of their previous experiences, their paths, and their tracks in life, and by doing so, it helps individuals to construct and reaffirm their personal identities. This process is tempting, for along with the sense of familiarity, individuals could also acquire additional supplemental emotions, including comfort, satisfaction, security, stability, calmness, and belongingness.

Yet, the most crucial process of imagined nostalgia is to direct nostalgic feelings and one's identity toward a generic category, or group identity. In fact, the production of the sense of familiarity is highly regulated, selective, exclusive, and under precise control. Among all of the countless objects that a person had encountered, only those relating to a group—more precisely, the specific type of group known as ethnicity or nation—are selected, and therefore only memories relevant to ethnicity/nation are summoned. For instance, it is possible when a Taiwanese nationalist travels abroad and sees an exhibition of flags at a tourist spot, the first thing they find is the 'absence' of the ROC flag: In that context, the object they see is highly selective, even it is an object that is missing in the occasion.

³⁹ Ibid., 160.

However, these memories provoked by nostalgic objects are not limited to those of experiences directly associated with the ethnicity/nation—for instance, participating in a revolution or political reform crucial to the establishment of that nation state. Instead, they can encompass reminders of national history, of the commonness shared by all nationals, or of differences between nationals and foreigners. These memories of similarity/dissimilarity collectivises individuals' feelings, thereby giving them the impression that their sentiments are shared within a particular community. Imagined nostalgia is thus a type of discourse that associates individuals with communities and generates statements such as 'This is my (people's) past', 'This is my (people's) history', 'This is my hometown', and 'This is my (people's) nation', notwithstanding the vagueness of the concepts addressed.

Therefore, not only the connection between nostalgic objects and generic ideas but also the 'past' aroused by them can be purely fictional and imaginative. The 'past' can refer to a place where subjects have never been, a time they did not actually live through, or a group whose members they have never met. And, by means of construction, imagined nostalgia can be collectively fabricated with national education, mediated by cultural practices, and sustained via fond familial feelings, all of which appear in empirical cases addressed in this section's discussion.

China: The Mother Country

In order to illuminate the operation of imagined nostalgia on identity formation, I discuss in this section three of my subjects, Luohung, Lan, and Liwen. Luohung was born in

Pingdong (屏東) County in a Hakka family in 1950.⁴⁰ He is the second of three children. His father was once a farmer in the countryside and later ran a pawnshop for a living. Luohung spent his early years in Pingdong and went to Kaohsiung at the age of fifteen for his senior high school education. He attended a university in Taipei and then further pursued his postgraduate degree at a teacher's university. He has become a high school teacher and mainly teaches in private schools and educational institutions.

Luohung possesses a very strong emotional attachment towards China, as he states in the interview many times: 'I'm *da-zhongguo-zhuyi* (大中國主義; Great-China ideology); I'm *da-zhonggyo-yishi* (大中國意識; Great-China consciousness)'. His feelings for China first appear in his explanation of his Chinese identity:

LUOHUNG: We had great dreams about China. Probably we, our generation, tend to have this Chinese dream.

Q: What kind of dream?

LUOHUNG: China was magnificent; it's also nice now. It might be because of the education we received when we were kids, which makes us have better feelings and impressions towards China. [...]

Q: What kind of good impressions, could you be more specific?

LUOHUNG: For example, we thought the history of China was long and great. It has five thousand years of history, right? The past heroes and figures, historic buildings, antiques; we were curious about them and thought they were remarkable.

Luohung recalls a moment when he experienced a strong affection for China, that is, during his first visit to China:

Q: What did you feel when you went to *dalu* for the first time?

LUOHUNG: Very good. It was just to ... go to '*zuguo*' (祖國; the mother country). It felt not bad.

Q: Which aspects (were not bad)?

LUOHUNG: Certainly not the system, right? It just felt as if, finally, I had arrived at *zuguo*. We still called it *zuguo*. And it [*zuguo*] was not bad. Just as if I finally arrived at *dalu*. ... Well, it was just regular travelling; I was not there for other things, right?

⁴⁰ Hakka is an ethnic group in Taiwan conventionally included in the category of *benshengren*. Luohung used the Hakka language as a child and still can speak it fluently. For more information on Taiwan's ethnic classifications, refer to the introduction chapter.

Q: But it sounds like it's still different from 'regular travelling'. [...] The first time arriving at *dalu* must be different from travelling to America.

LUOHUNG: Of course it's different. ... It made me feel an extra emotion towards the place. Yes, feelings.

This feeling for '*zugno*', the mother country, was actualised by physical action when

Luohung and his friend visited a cemetery of Republican martyrs:

LUOHUNG: It (the first visit to China) was quite unusual and exiting. The first time we went to Guangzhou, a friend of mine even kneeled down in front of the cemetery of 72 Martyrs of Huanghua Gang (黃花崗七十二烈士, those killed in the 1911 uprising against the Manchu Qing Dynasty). He even kissed the earth there.

Moreover, Luohung cheers for Chinese athletes when they compete with foreigners other than Taiwanese. He also manifests an emotional insistence on the territorial integrity of his aspiring Chinese nation: the 'original', 'begonia leaf-shaped' nation. He clearly states his opposition to Taiwan and Tibetan independence and mourns the loss of Mongolian territory in the 1920s, which took a big bite out of the begonia leaf. His feelings for Great China are even stronger than those he has for the KMT. He broke away from the party once, and it was because he could not tolerate the KMT chairman of that time, Lee Teng-hui (李登輝), who made statements that seemed to support Taiwan independence:

Q: So, you were saying that in 1994 you left the KMT because Lee was ... too '*bentu*' (本土, native)?⁴¹

LUOHUNG: Yes. He supports Taiwan independence.

Q: How did you know that? It was 1994!

LUOHUNG: There were these sayings at that time.

Q: But 1994? Did he do anything or say anything then?

⁴¹ The term '*bentu*' means, literally, indigenous, local, or native, but Luohung uses it to refer to *benshengren* and Taiwan/Taiwanese. This makes some sense because, compared to *waishengren* who only arrived in Taiwan in 1949, *benshengren* are local and more indigenous, nearly all having descended from migrants who came from south China three generations or more prior to 1945. When Luohung says that Lee Teng-hui could not get along with the *waishengren* faction in the KMT because Lee is *bentu*, what he really means is that Lee is *benshengren*. Thus the conflict between *bentu* and *fei-bentu* Luohung mentions later in the report is in fact the provincial-origin conflict.

LUOHUNG: It was the conflict between ‘*bentu*’ (native 本土) and ‘*fei-bentu*’ (non-native; 非本土). We supported the side of *waishengren*.

Q: But you are Hakka (*benshengren*).

LUOHUNG: Yes, I am *benshengren*. But as I told you before, decades ago I supported Great China ideology.

Apparently, Luohung attributes almost all of his political orientations, including his political identity, his party affiliation, his support for the *waishengren* group, his yearning for unification with China, and so on, to a single factor: his Great-China ideology—manifested by his great passion for China, his mother country.⁴² His reports explicitly reveal the influential work of his fervent feelings for China. These feelings must have been provoked by the Chinese nationalism taught in the national education: Luohung was not born in China and has never gone there, nor have his parents or grandparents. Before his first visit to the mainland, he already had strong nationalist sentiments for China and regarded it as his motherland. I call these particular feelings, that is, special wistfulness for a homeland where one has never actually been, ‘imagined nostalgia’.

Imagined Chinese Nostalgia and Chinese (Han) Cultural Practices

Luohung’s sense of familiarity with the imagined Chinese nation came from (was constructed by) the national education he received at school. For others, the wistful feeling could be based on daily Chinese (Han) cultural practices in the society, stories of popular culture, narratives told in the family, people they recall from childhood, and so

⁴² As presented in the previous section, Luohung’s political orientations seem to be forged and shaped by at least two factors: Chinese affection, and his detestation of the DPP. Take his perception of the provincial-origin conflict in Taiwan: although he is *benshengren*, Luohung does not adopt the anti-*waishengren* narratives but, instead, rejects the discourse. One reason is that he has never personally encountered any discrimination or exploitation from *waishengren*. As a result, Luohung gives the anti-*waishengren* narrative (the one in which people like him are bullied by *waishengren*) less credence and views it as less significant for Taiwanese society. He considers this narrative, along with the appeal for Taiwan independence, to be manipulations that the pan-green politicians use to mobilise supporters and create divisions in society from which they can benefit. It thus would be a bit overreaching to use his Chinese affection to explain his conceptualisation of the provincial-origin conflict. Rather, his extreme dislike of the DPP offers a more plausible explanation.

on. The report of Lan, discussed in the previous chapter,⁴³ offers an ideal vantage point from which to further explore the influence of Chinese (Han) cultural practices. Asked whether she has been to China, Lan replies:

LAN: Yes. Beijing and Suzhou.

Q: How do you feel about Beijing?

LAN: We went to the Great Wall, and my brother said he had never dreamed that he would have a chance to climb the Great Wall. How could we have that chance? We had heard the story that the weeping of Lady Meng Jiang (孟姜女) collapsed the Great Wall.⁴⁴ But it's only a story. That's why my brother said that. [...]

Q: Were you moved when climbing the Great Wall?

LAN: Yes! It's really built of stones. The stones under my feet were a little loosened; it's thousands of years old, after all. Two thousand years. And there are so many people climbing it. It's a bit dangerous. [...]

Q: The story you just mentioned is ...

LAN: The weeping of Lady Meng Jiang collapsed the Great Wall. It's a story, a tale. Lady Meng Jiang was demoted and sent to the earth. I heard this story from elders.

Q: Elders told this story when you were a child?

LAN: Yes. Lady Meng Jiang fell in love with Fan Qi-liang (范杞良), and she was caught and sent to earth. They were punished; they were a couple who loved each other but could not be together for seven lives. Like Butterfly Lovers and Xuemei-sijun (雪梅思君; literally, Xuemei misses her husband). I only know these two. They were in love with each other but could not be together.

Q: Who told you the stories?

LAN: My father.

Q: When did he usually tell these stories?

LAN: At dinner or any casual time, he told us stories.

Q: Had he gone to school?

LAN: No.

LAN: If he had never studied, how could he know about these stories?

LAN: It's passed through generations. Maybe.

⁴³ Briefly, Lan was born in Taichung County, Taiwan in 1932. She has been a farmer in her hometown, and her eldest son is a civil servant in the county. She identifies herself as both Chinese and Taiwanese, but says she only claims Chinese identity when there is a government official present.

⁴⁴ In the traditional folk tale, Meng Jiang was an ordinary young woman in the Qin Dynasty, whose husband (Fan Qi-liang) was forcefully recruited and sent to build the Great Wall for the emperor. Waiting in vain for his return and hearing no news from him, Meng Jiang departed and travelled to seek for the husband. She searched the land and eventually learned her husband had died. In unbearable sorrow, she burst out crying, and her wailing was so intense that it caused a part of the Great Wall to collapse. In other versions Lady Meng Jiang's identity is a divine. For breaking heaven's rules, she was punished by being sent to earth to suffer heart-breaking love for seven lives. The story of Lady Meng Jiang is the first of these lives.

In fact, these Chinese (Han) folk tales like that of Lady Meng Jiang not only were told in families but also were often the themes of traditional and local dramas, such as Taiwanese (folk) opera (歌仔戲) and glove puppetry (布袋戲). It means that even during the Japanese regime, that is, before the Chinese government (KMT) took over Taiwan and promoted its nationalism on the island, people in Taiwan had never severed cultural and ethnic connections with 'China'.⁴⁵ Many of my reporters who had lived through that period perceived clear differentiations between Japanese and Taiwanese (Han) cultures. The languages, clothes, holidays, and other cultural practices were generally distinguishable, although there were different degrees of acculturation and hybridisation.⁴⁶ For instance, as Lan recalls, Taiwanese people still celebrate the Lunar New Year, whilst Japanese people only celebrate the modern Gregorian New Year.

The point is, people's consciousness of cultural and ethnic connections with the mainland can add a particular sense of familiarity to their conceptualisation of the idea of 'China'. In Lan and her brother's case, stories that they heard in childhood from their parents feature their ancestors and are staged on the land across the Strait, and thus these stories endow this faraway land (China) not only with meanings but also with a sense of familiarity and connection. Just as Luohung found that his first visit to China was different from visiting America, Lan and her brother recalled the story that their father told them when climbing the Great Wall, and this childhood memory certainly would not have been stirred if they visited the Grand Canyon. This is how imagined nostalgia works: it connects Lan and her brother's childhood memory with the discourse of Chinese identity (the discourse defining who are Chinese); and it connects Luohung's

⁴⁵ I use quotation marks here to emphasise that people at that time might not have used this term to refer to the ethnic Han nation across the Strait. 'Qing-guo' (清國; literally, nation of Qing) or 'Han' might have been more frequently used.

⁴⁶ See Ching Leo T. S., *Becoming "Japanese": Colonial Taiwan and the Politics of Identity Formation* (Berkeley [Calif.], London : University of California Press, 2001); and Hao Zhi-dong, 'Japanization, Re-Sinicization, and the Role of Intellectuals', in his *Whither Taiwan and Mainland China: National Identity, the State and Intellectuals*, 28–49 (Hong Kong University Press, 2010).

familiar story of miserable modern China that he learnt at school with his fervent Chinese nationalist discourse in his first visit to China: when he landed, what he recalled was the imagining of nationalist martyrs who established the nation, the imagining of his divided country, and the imagining of motherland. And these feelings can exist even when purely mediated. Lan and Luohung had never been to China before; their feelings of acquaintance originated from the stories either heard from family and society, or taught in school. Imagined nostalgia is based not on recalling individuals' past experiences of 'being there' but on recalling ideas, meanings, and images that have been articulated with the affectional object.⁴⁷

That being said, Luohung and Lan exhibit slight differences at the emotional level. Though Lan senses her cultural and ethnic relationship to China, it is difficult to confidently determine whether she identifies as Chinese and regards China as her lost motherland. More precisely, though Lan calls China *zūguo* ('mother country') in her interview, as the previous chapter has shown that she does not seem to identify herself as Chinese; only when facing governmental officials would she make such a claim. By contrast, Luohung fervently embraces Chinese identity. He feels a sense of homecoming upon his first visit to the motherland and recognises China as his original country and his once-lost nation that he is keen to reclaim. Altogether, Luohung and Lan's differences stress that different individuals can have different levels of nostalgic feeling toward a particular generic concept, and have different levels of identity attachments. Even if one possesses a sense of wishful longing for a place, any sense of familiarity does not necessarily translate into identification with that place or with any concept that it characterises. By extension, this sense of familiarity is not a factor that directly determines people's (nationalist) identities.

⁴⁷ The concept of 'being there' is emphasised here to differentiate the broad idea of 'personal past experience'. More specifically, Lan hearing stories from her father and Luohung learning about *zūguo* are forms of 'personal experience', but the fact I wish to stress is that both of them had never been to China (being there) although they possessed these feelings of familiarity for the place.

The Articulation (Construction) of Imagined Nostalgia: Familial Feelings

Liwen provides another example of how a sense of familiarity can be generated by early life experiences. Born in a *waishengren* family, Liwen lived in an environment full of various 'Chinese' elements and thus possesses a sense of nostalgia towards China, but her feelings about Chinese identity are complicated. She is a 22 year-old student (born in 1989) in Taipei. She is the eldest of the family's three daughters. Her father is on the administrative staff at a university in Taipei. Liwen, like her father, completed all her compulsory education in Taipei. She had just graduated from university when I spoke with her and was seeking a job. Liwen is doubtful and insecure when asked to select an identity. She ends up opting for 'both Chinese and Taiwanese, and Taiwanese prior', complaining that what she would really like to choose is 'Shandong-ren' (山東人; a person from the Shandong Province of China) or 'Taipei-ren' (a person from Taipei), because her grandfather came from Shandong, and because she was born and has lived in Taipei for years.

The reason Liwen claims Shandong identity is that, during her childhood, she had a close relationship with her grandfather. Although describing little of his days in Shandong, Grandfather taught her many songs from the area:

Q: Had he mentioned things about Shandong often?

LIWEN: No, but he taught me some children's ballads and so on.

Q: And you still remember and can sing some of them?

LIWEN: Yes.

Q: But, I guess you would mind doing that right now.

LIWEN: [Laugh] Probably. But you know, we Shandong-ren are supposed to be free and easy.

And it is this familial feeling for her grandfather that inclines Liwen to identify herself as Chinese:

LIWEN: When I was little, because my grandfather is Shandong-ren, I always felt that China is close to me. I felt it intimately. Because all my grandfather's friends are *waishengren*, I would just think, 'hmm, very good'.

Besides Chinese identity, Liwen also possesses a sense of nostalgia for China. She feels China 'intimately' and 'close to' her, as she states in the interview. Before her first visit to China, she expected it would feel like 'going back home'. These nostalgia-like feelings were thoroughly mediated by her feelings towards her grandfather and were generated by recollections of childhood experiences. The grandfather had a strong Shandong accent, and his friends (who were also their neighbours) all came from different provinces in China. Liwen therefore grew up in an environment full of various accents and dialects. One of their closest friends was from Sichuan, so Liwen is particularly familiar with Shandong and Sichuan accents. She expected a sense of 'coming back home' before her first visit to China, and when she visited and heard these two accents, sometimes she did have feelings of returning to the home of her childhood. Her case clearly manifests how one's imagined nostalgia, that is, a feeling of home about a place which one has never visited, is constructed by familial feelings and childhood experiences, and how this feeling is then aroused when one makes an actual visit to the nostalgic place.

Yet, despite Liwen's openness to Chinese identity and her general imagined nostalgia for China, she possesses quite ambivalent feelings towards China/Chinese people. Her imagination and feelings about 'China the motherland' were challenged, if not shattered, after several visits to the country made her recognise the huge differences between Taiwanese and Chinese people:

Q: So, for the term 'Chinese', you felt it intimately when you were little, but the intimate feelings dissipated afterwards?

LIWEN: Yes. Not until I visited there myself did I feel strange. We are fundamentally not the same people.

Q: Totally different?

LIWEN: Totally! Our ways of thinking are different, too. So are the ways we speak.

She jokes that Chinese people are not ‘normal people’ (一般人民), and says she does not know how to get along with them. To her, Taiwanese are more reserved and shy, whilst Chinese are just the opposite: They speak in high and sharp tones of voice, and this usually makes her uncomfortable. She has also heard from her Hong Kong friends that Chinese living conditions are crowded and untidy. For these reasons, Liwen does not feel she is a member of the Chinese people, rejects Taiwan’s unification with China, and prefers Taiwan to be independent.⁴⁸

However, although her opinion on Taiwan’s future corresponds to the DPP’s policies, Liwen has rather poor impressions of the party.⁴⁹ Like Jane, Liwen blames the party for manipulating issues of national identity and provincial origin during elections. More precisely, Liwen accuses the DPP of dividing the society between Taiwanese and non-Taiwanese and by whether one can speak Taiyu or not. As a *waishengren* who is unable to speak Taiyu, Liwen feels excluded from the category of ‘Taiwanren’. Unfortunately, she has encountered this ‘humiliating’ (as she says in the interview) ethnic discrimination from other Taiwanese people in her daily life:

LIWEN: It seems... I wouldn’t say, ‘Oh, I’m Taiwanese’, but, ‘I’m Taipei-ren’ [a person from Taipei].

Q: Why not choose ‘Taiwanese’?

LIWEN: It’s probably because I have been abroad a lot, and I think more people know ‘Taipei’ than know ‘Taiwan’.

Q: Really?

LIWEN: Yes. They would know better if I say, ‘I’m Taipei-ren’. [...]

Q: Is this the only reason?

⁴⁸ This conceptualisation of Chinese people (the PRC citizens) as an inferior group with poor manners and less civilised behaviours is one form of the cultural hierarchies—another significant type of discourse capable of forging and shaping people’s Chinese/Taiwanese identity in Taiwan. This discourse is explicitly discussed in chapter four.

⁴⁹ In fact, it can be said that Liwen subscribes to the anti-DPP narrative; the discourse will be discussed in detail in the following section.

LIWEN: Well, part of the reason.

Q: How about the other part?

LIWEN: Oh, because I was humiliated ... because I can't speak Taiyu.

Q: Really?

LIWEN: Yes ... by a lot of people.

Q: A lot? Has that happened many times?

LIWEN: Many.

Q: When?

LIWEN: I was learning to dance, and I went to a tutor's dance lesson before. He was a professor who had studied in the USA and came back to teach. Once, his wife spoke Taiyu to me, and I responded like, 'Sorry, I can't speak Taiyu'. Then the tutor scoffed: 'You are a Taiwanese, but you cannot speak Taiyu'.

Q: How old were you then?

LIWEN: Probably when I was in high school. Another time ... I went abroad and went to Beijing. There, I was talking with a Beijing person [in a shop]. Then one customer turned to me and asked: 'Where are you from?'

Q: A customer?

LIWEN: Yes, he was a customer just like me, but I did not know him at all.

Q: Was he Taiwanese?

LIWEN: Yes. He turned to me and asked where I was from ... Well, he spoke with a Taiwanese accent ... And I said, 'I'm Taiwanese'. He said, 'What? You are Taiwanese? But you don't have a Taiwanese accent. What kind of Taiwanese are you?' I was thinking, 'God, do I have to speak with a Taiwanese accent to be a Taiwanese?' I just don't understand.

Q: Oh... And this happened when you were a high school student?

LIWEN: Yes. Well, it hasn't happened since I went to university.⁵⁰

Q: So, you must have complex feelings towards the term 'Taiwanese'.

LIWEN: Perhaps. [Laugh]

Liwen opts for dual identity and regards herself as both Chinese and Taiwanese. Yet the fact remains evident that she is not totally comfortable with either identity. On the one hand, Liwen was born and grew up in Taiwan but feels excluded from the category 'Taiwanese' due to her inability to speak Taiyu. On the other hand, she is aware of her ethnic roots from China but also perceives huge differences between Taiwanese and Chinese people. She even uses 'going abroad' during the interview to describe her

⁵⁰ Liwen attended junior and senior high schools between 2003 and 2008; it happened to be under Chen Shui-bian's administration.

visits to China. As a result, she would rather respond with ‘Shandong-ren’ or ‘Taipei-ren’ to my inquiry about her identity.

Liwen’s grandfather passed away just a few months before the interview. His passing, in an odd way, somehow reaffirmed Liwen’s Chinese identity. When I try to make sure that her identity selection was ‘option 4’, that is, ‘both Chinese and Taiwanese, and Taiwanese prior’, she responds:

LIWEN: Yes, option 4.

Q: So, what is ‘Chinese’ when you make this identification?

LIWEN: Because I do have that blood. And I think... it should be traced to... I feel it is because... When my grandfather passed away, I was kind of shocked.

Q: What do you mean by ‘shocked?’

LIWEN: When my grandfather passed away, we were tossing divination blocks.⁵¹ The blocks never went one face-up and the other face-down (which would indicate ‘yes’). The psychic said it was because my grandfather still had concerns and could not go peacefully, and the psychic asked us to make him a wish of relief. Then, we made a vow that we would take [the ashes of] my grandfather back to Shandong, and the blocks responded! It might be a coincidence, but I would feel... if it could let him go more peacefully, I will believe... It’s better for me. Therefore, I realised... to us, Shandong is a very important place. So, I always believe that [I] will go back sooner or later. Everyone is going back, sooner or later, and has a home there.

Q: Even so, you would not support unification with China?

LIWEN: Not necessary... It’s just like... Well, commuting between the two places. Just like, I am married to [a person in] Taiwan... And just like that person who is married to Taiwan, [...] she is still Taiwanese.⁵²

⁵¹ Dropping divination blocks (擲筊杯; zhi-jiaobei) to the floor is a way of communicating with divinities, ancestors, and the deceased, in accordance with Taoist tradition. When the two crescent-shaped blocks land one face-up and one face-down, it means ‘Yes’ to one’s inquiry to a divinity (ancestors). If the blocks are both face-down or face-up, the answer is negative.

⁵² In this phrase, Liwen uses a metaphor of marriage to describe her identity. She thinks she should be Chinese because her grandfather came from China, and she is also Taiwanese because she has settled on Taiwan. Thus, she is like a married-of daughter in the traditional sense: China is her original family (the home of her grandfather), whilst Taiwan is the family of her in-laws (the home she has settled in), for which she bears children with their paternal identity.

Ethical Narrative

The second emotional discourse presented in this chapter is ethical narrative:⁵³ a type of narrative depicting a primitive scenario of moral dualism and conflict between good and evil. Ethical narrative is both an emotional and value-oriented discourse that exercises its influence in two approaches. On the one hand, it implies a moral obligation to support the good side and reject the evil one. This moral framework can be constructed in two steps. The first is arbitrary dualistic division between the two groups: the good and the bad. The second is narrating a simplistic storyline, which depicts the brutal, powerful villains mercilessly oppressing the powerless, benevolent, pristine people. These moral structures demand moral action from audiences by urging them to participate in supporting good and combating evil. On the other hand, ethical narrative provokes an emotional response by inspiring positive feelings, including sympathy and a sense of justice, for the good side and negative responses such as condemnation, anger, and resentment toward the bad one. With this mechanism, ethical narrative offers audiences two coordinates: one emotional, the other moral. In that sense, ethical narrative does not merely tell a story, but also invites its audience to play a role in that story. Furthermore, because the story is highly simplified—there are only two characters—and devoid of nuance—the good is simply good, whereas the evil is simply evil—audiences have no

⁵³ Narrative analysis has been utilised as a very useful technique for scholars to explore issues of identity in particular, and it has developed various tools and methodological approaches to deal with different aspects and topics. For instance, in Taiwan, A-chin Hsiao, *Return to Reality: Political and Cultural Change in 1970s Taiwan and the Postwar Generation* (Taipei: Institute of Sociology, Academia Sinica, 2008), has applied this technique to illustrate the identities of the ‘generation of returning to reality’ (the generation that reached adulthood and started to pay attention to politics in the 1970s) by analysing the documentary materials of elites of this generation. Succinct but comprehensive theoretical and methodological discussions can be found in Molly Andrews, *Shaping History: Narratives of Political Change* (Cambridge: Cambridge University Press, 2007), and her *Doing Narrative Research* (Los Angeles, Calif.; London: SAGE, 2008). My research here does not heavily engage these debates but, using interview transcripts as materials, manages to search for examples of moral dualism in subjects’ narratives that are capable of evoking their personal affinities. As for the term ‘emplot’, in brief, it is used in narrative analysis to refer to the placing of events into the context of a plot or a storyline, or to arranging events in a meaningful way/order. See Tom Wilks, ‘Social Work and Narrative Ethics’, *British Journal of Social Work* 35, no. 8 (September 2005), 1249–64; Margaret R. Somers, ‘The Narrative Constitution of Identity: A Relational and Network Approach’, *Theory and Society* 23, no. 5 (October 1994), 605–49.

choice but to identify with those designated as good and to adopt their perspective. Put differently, ethical narrative by definition presents a backdrop against which audiences can practice morality and, in so doing, forges and shapes their identity.

With regard to Chinese and Taiwanese identities in Taiwan, my fieldwork uncovers several different, related ethical narratives:⁵⁴ East-West antagonism, in which Chinese are the benign, oppressed Easterners posed against the malign Western imperialist oppressors;⁵⁵ China-Taiwan antagonism, in which Taiwanese are the good guys and Chinese are the bad guys;⁵⁶ the anti-*waishengren* or anti-KMT (Kuomintang) narrative, which describe either the *waishengren* ethnic group or the KMT as the oppressor bullying the *benshengren* group or Taiwanese people;⁵⁷ and the anti-DPP (Democratic Progressive Party) narratives, in which the DPP and its supporters are the villains, treasonously plotting separatism, promoting Taiwanese independence, excluding *waishengren*, and causing social disorder.⁵⁸ Each of these is discussed, with detailed case studies, in this chapter.

⁵⁴ In this chapter I use the terms ‘discourse’ and ‘narrative’ alternatively, because in Foucault’s theory, narrative is one of many forms of discourse (see discussion in the introductory section of Chapter Two). Particularly, I use ‘narrative’ to emphasise the ‘plot’ characteristic of a certain discourse (that is, with clear storyline and vivid characters), and ‘discourse’ is used to stress on the ‘power’ characteristic of a narrative (that is, its capacity to influence/regulate its subjects or other discourses).

⁵⁵ Some statistic information concerning the East-West antagonism of this research should give reader a preliminary picture: Among the total 108 participants, 23 manifest the effect of the East-West antagonistic narrative. 19 persons identify themselves as both Chinese and Taiwanese, when merely 4 regard themselves as Taiwanese only. 10 are *waishengren*; 13 are *benshengren*. 4 were born before 1945; 8 were born in the years between 1946 and 1983; 11 were born after 1984.

⁵⁶ The influence of China-Taiwan antagonistic discourse can be observed in 27 participants’ interviews. 21 of them identify themselves as Taiwanese only, while only 6 possess the dual identity. 20 are *benshengren*; 7 are *waishengren*. 2 persons were born before 1945; 14 were born in the years between 1946 and 1983; 11 were born after 1984.

⁵⁷ 25 participants in my research are identified to possess the anti-KMT discourse. Only two of them possess the dual identity, while all other 23 people identify themselves as Taiwanese only. 3 are *waishengren*; 22 are *benshengren*. 5 were born before 1945; 17 were born in the years between 1946 and 1983; 3 were born after 1984.

⁵⁸ 34 participants in my research believe the anti-DPP discourse. All identify themselves as both Chinese and Taiwanese (no one claim Taiwanese only). 19 people are *waishengren*; 15 are *benshengren*. 13 were born before 1945; 16 were born between 1946 and 1983; 5 were born after 1984.

Table 3-1: Demographic information for 23 participants whose identities have been influenced by the East-West antagonistic narrative

<i>Categories</i>	<i>Sub-categories</i>	<i>Number of participants</i>	<i>%</i>
Gender	Male	17	73.9
	Female	6	26.1
Chinese/Taiwanese Identity	Dual (Chinese and Taiwanese)	19	82.6
	Taiwanese	4	17.4
Year of Birth	Before 1945	4	17.4
	1946–1983	8	34.8
	After 1984	11	47.8
Provincial origin	Benshengren	13	56.5
	Waishengren	10	43.5
Total number of participants		23	

Table 3-2: Demographic information for 27 participants whose identities have been influenced by the China-Taiwan antagonistic narrative

<i>Categories</i>	<i>Sub-categories</i>	<i>Number of participants</i>	<i>%</i>
Gender	Male	14	51.9
	Female	13	48.1
Chinese/Taiwanese Identity	Dual (Chinese and Taiwanese)	6	22.2
	Taiwanese	21	77.8
Year of Birth	Before 1945	2	7.4
	1946–1983	14	51.9
	After 1984	11	40.7
Provincial origin	Benshengren	20	74.1
	Waishengren	7	25.9
Total number of participants		27	

Table 3-3: Demographic information for 25 participants whose identities have been influenced by the anti-KMT (*waishengren*) narrative

<i>Categories</i>	<i>Sub-categories</i>	<i>Number of participants</i>	<i>%</i>
Gender	Male	17	68
	Female	8	32
Chinese/Taiwanese Identity	Dual (Chinese and Taiwanese)	2	8
	Taiwanese	23	92
Year of Birth	Before 1945	5	20
	1946–1983	17	68
	After 1984	3	12
Provincial origin	Benshengren	22	88
	Waishengren	3	12
Total number of participants		25	

Table 3-4: Demographic information for 34 participants whose identities have been influenced by the anti-DPP narrative

<i>Categories</i>	<i>Sub-categories</i>	<i>Number of participants</i>	<i>%</i>
Gender	Male	22	64.7
	Female	12	35.3
Chinese/Taiwanese Identity	Dual (Chinese and Taiwanese)	34	100
	Taiwanese	0	0
Year of Birth	Before 1945	13	38.2
	1946–1983	16	47.1
	After 1984	5	14.7
Provincial origin	Benshengren	15	44.1
	Waishengren	19	55.9
Total number of participants		34	

The East-West Antagonistic Narrative

One of the intriguing characteristics that Haoping's and Kaiwei's accounts,⁵⁹ presented in the previous chapter, have in common is that when they claim Chinese identity, the concept of Chinese can refer to the idea of '*dongfangren*' (東方人, Easterners). This shows that their Chinese identity can be based on the conceptual dichotomy between Easterners and Westerners: To them, 'Chinese' can represent all Easterners—all people with yellow skin, black eyes and black hair—contrasted with Westerners—people with white skin and blue eyes. This dichotomy is the moral dualism of what I call the 'East-West antagonistic narrative', as it places much stress on the rivalry between the two sides: Easterners and Westerners. For individuals such as Haoping, this serves as the primary influence forging and shaping their understanding of the meaning of Chineseness (as well as their Chinese identity). Consider Haoping's response to the question: 'Would you say you are Chinese or Taiwanese when meeting foreigners?'

Q: Is there any occasion on which you will claim that you are Chinese?

HAOPING: At present? Eh... When... [we are] 'invaded' by foreigners? How should I describe that? Let me think for a moment...

Q: You mean, when being bullied?

HAOPING: When we have to defend ourselves from outside enemies.

Q: Why don't you say you are Taiwanese then?

HAOPING: The feelings are different. We should 'develop' a 'Chinese solidarity' (*zhongguoren de tuanjie* 中國人的團結).

Q: You mean that Taiwanese are not united?

HAOPING: It might be a little bit strange, but it should be that... when Mainland China and we, together, are against enemies from outside, I would be proud of being Chinese, not Taiwanese. That is, we are together holding certain Chinese characteristics and spirit to fight against foreigners' invasions.

Q: Are we being invaded now?

⁵⁹ Recall from Chapter 2 that Haoping was born in Ilan in 1981 to a *benshengren* family, and now is a military officer in Taipei. Kaiwei was born in 1987 in Taipei (also *benshengren*) and is currently a postgraduate student in Tainan. They possess similar identity patterns: both regard themselves as members of the '*Zhonghua-minzhu*' (the supra-ethnic Chinese nationality) and *dongfangren* (Easterners), and thus identify themselves as both Chinese and Taiwanese.

HAOPING: No. It was a long time ago... the 'Eight-Nation Alliance' period (in 1900).

Q: Then, currently, there seems no such occasion for you to say that you are Chinese?

HAOPING: No. There is none at present.

Haoping's account suggests that in his everyday life he is reluctant to claim Chinese identity. The meaning of 'Chinese' that he usually uses is one that refers exclusively to *daluren* (mainlanders), and he prefers to be called Taiwanese when travelling abroad because he worries about being mistaken for a mainlander by foreigners. Nevertheless, Haoping insists unequivocally on his Chinese identity, despite not having any occasion to use it. The only opportunity for him to claim Chinese identity is a scenario that is purely fictional, one that is farfetched in today's world, a scenario harking back to the age of imperialism, when Western imperialists wielded their superior power against the late Qing and early Republican states (that is, the 'Eight-Nation Alliance' period that he indicated).

The question then is: why does Haoping so unflinchingly embrace Chinese identity even though, to him, there is only one type of situation in which to actualise this identity, and that situation is highly unlikely? Why is that scenario from the past critical to his current identity? The next section posits that what really matters is not the scenario itself, but the moral principles that are conveyed and appealed to by the discourse that uses this scenario as its storyline.

Moral Principles of the East-West Antagonistic Narrative

The ethical narrative of the East-West antagonistic discourse has three main attributes. First, its narrative background is set in late nineteenth- and early twentieth-century China (not Taiwan), when the Qing Empire faced insistent demands for free trade and the threat of imperialism from the developed powers, and was apparently incompetent to

deal with the challenge. Second, the scenario contains two main characters: (1) the Chinese people (governed by the Qing), which is to say, China, imagined as a collective entity; and (2) the imperialist powers, described collectively as ‘enemies from outside’ and ‘foreigners’, as in Haoping’s account. Since historically most of the imperialist powers have been Western countries, the moral dualism can be easily conceptualised as antagonism between Easterners (yellow races) and Westerners (white races).⁶⁰ Third, in this narrative China (the Chinese people) was exploited, bullied, oppressed and under grave threat from invasion, division, and colonisation by the imperialist powers. Thus the moral dualism of the ethical narrative is clear: China (the Chinese people) is the benign, whilst the imperialist powers are the malign. The moral principle is to resist the oppression of the Westerners and the moral action guided by this principle can be, as Haoping’s account suggests, for Chinese people to foster solidarity among themselves and resist the common opponent, the foreign imperialists. In other words, it is this moral principle that obliges Haoping to claim and embrace Chinese identity.⁶¹

Two other analyses presented in the previous chapter also support my argument that the East-West antagonistic narrative ethics is important in generating nationalistic

⁶⁰ Japanese are the only exception: they are Easterners but they have also been imperialists/colonisers to this group of subjects. Although they were used to be bullied by the Westerners before their political and social reformation, they had become another imperialist invaders attacking and occupying China after they grew strong. Rana Mitter in his work, *The Manchurian Myth: Nationalism, Resistance, and Collaboration in Modern China* (University of California Press, 2000), shows how Japan had gradually replaced the image of conventional Western powers as the chief target of anti-imperialism in China since it installed a pro-Japan government in Northeast China in 1932.

⁶¹ A similar discourse is Rigger’s notion of ‘anti-imperialism’. Shelley Rigger, ‘Competing Conceptions of Taiwan’s Identity: The Irresolvable Conflict in Cross-strait Relations,’ *Journal of Contemporary China* 6, no. 15 (1997): 307-317. Stressing the cognitive aspect, Rigger uses this term to explain the mindset of some unificationists in Taiwan (people supporting unification with China). The anti-imperialist discourse suggests: (1) the “true” borders of China include all those territories claimed by the Qing at the end of the eighteenth century; (2) Japan’s claim to Taiwan was illegitimate and its occupation interrupted Taiwan’s link to its mother country, bringing nothing but misery to the Chinese people residing on the island; (3) all expressions of support for Taiwan independence or continued separation are on-going imperialist interference in China’s affairs. However, I argue that in terms of identity, the anti-imperialist discourse may not be a very appropriate analytical unit because, first, as illustrated, Rigger’s analysis is only on the cognitive level, yet identity functions not merely on one’s knowledge but also other aspects such as psychology, emotions, senses of morality, etc. Second, the term ‘East-West antagonism’ clearly shows the form (i.e., the dualistic structure) and the content (i.e., East versus West) of this ethical narrative at once, while ‘anti-imperialism’ does not refer either. This thus makes ‘anti-imperialism’ not necessarily relevant to identity. For example, a left-wing supporter in Taiwan may oppose imperialism, but this does not mean this person would claim Chinese identity.

feelings. The first one is the emergence of the idea of a ‘supra-ethnic Chinese nationality’ and the development of racial discourses in late-nineteenth-century China. It has been suggested by some scholars that these two newly invented discourses aimed to save the Chinese nation by reforming or even overthrowing the ‘diseased’ Qing Empire. But, more accurately, what these emerging discourses tried to deal with were the immediate onslaught of oppression from foreign imperialist powers, rather than the ongoing corruption and incompetence of the Qing Dynasty.⁶² This is why such racial discourses continued to operate even after the Qing had fallen. As noted in Frank Dikötter’s work,⁶³ a primary school textbook from early-1920s’ China plainly states that ‘China is the yellow race and ‘only the yellow race competes with the white race’.⁶⁴ Also, in appeals for

⁶² Research such as Frank Dikötter, *The Construction of Racial Identities in China and Japan: Historical and Contemporary Perspectives* (London: Hurst, 1997); Dru C. Gladney, *Dislocating China: Reflections on Muslims, Minorities, and Other Subaltern Subjects* (Chicago: University of Chicago Press, 2004); and Thomas S. Mullaney et al. (eds), *Critical Han Studies: The History, Representation, and Identity of China's Majority* (University of California Press, 2012) addresses the formation of the supra-ethnic Chinese nationality in the late nineteenth century China. In addition, the relationship between the emergence of Chinese nationalism since the late nineteenth century and the anti-imperialist discourse has been well articulated by many scholars, such as Tang Xiaobing, *Global Space and the Nationalist Discourse of Modernity: The Historical Thinking of Liang Qichao* (Stanford: Stanford University Press, 1996); Timothy Brook, ‘Collaborationist Nationalism in Wartime China’. In *Nation-Work: Asian Elites and National Identities*, edited by Timothy Brook and Andre Schmid (Ann Arbor, MI: University of Michigan Press, 2000), 159–90; and James L. Hevia, ‘Remembering the Century of Humiliation: The Yuanming Gardens and Dagu Forts Museums’. In *Ruptured Histories: War, Memory, and the Post-Cold War in Asia*, edited by Sheila Miyoshi Jager and Rana Mitter (Harvard University Press, 2007), 192–208.

⁶³ Dikötter, *The Construction of Racial Identities in China and Japan: Historical and Contemporary Perspectives*.

⁶⁴ In fact, “West” as an “Other” of China is a complex concept, conveying varied images to Chinese people in the nineteenth century. One might see the West possessing more advanced technology, more modern and civilised society, and a higher standard of living; another might focus instead on the West posing a threat to China. The perception of the West is not always antagonistic, and there have been numerous attempts to comprehend and theorise relations between East and West. Zhang Dai-nian 张岱年 and Cheng Yi-Shan 程宜山, in *Zhongguo wenhua yu wenhua lunzheng 中國文化與文化論爭 (Chinese Culture and Cultural Debates)* (Beijing: Remin University of China Press, 1990), 305–389, designate several paradigms, including ‘Chinese essence, Western application’ (*zhong-ti-xi-yong 中體西用*), ‘Western essence, Chinese application’ (*xi-ti-zhong-yong 西體中用*), ‘wholesale Westernisation’ (*quan-pan-xi-hua 全盤西化*), ‘Chinese exceptionalism’ (*zhongguo-benwei-wenhua 中國本位文化*), etc. That said, this chapter intends neither to engage with these debates, nor to study the developments of these discourses. Rather, it extracts from these discussions a common theme of dualistic discourse between the two ideas, East/Easterners and West/Westerners, exercising significant influence in the society. Given the historical fact of military menace posed by Western imperialists, it is hardly surprising that hostility and resentment would emerge amongst people in China and foster or bolster their Chinese identity. See also Wang Horng-luen, ‘Comparison for Compassion: Exploring the Structures of Feeling in East Asia’, in *Comparatizing Taiwan*, edited by Shu-mei Shih and Ping-hui Liao (Routledge, 2015), 59–89, for further discussion on the theme of resentment in modern Chinese nationalism. Today, the framework of ‘East meets West’ is also applied to study the identities of Asian artists and composers. See Frederick Lau, ‘Context, Agency and Chineseness: The Music of Law Wing Fai’, *Contemporary Music Review* 26, no. 5-6 (2007): 585–603.

solidarity, the supra-ethnic Chinese nationality discourse and the anti-imperialist discourses were still being invoked during the second Sino-Japanese War (1937–45) and in the civil war between the Communist Party and Nationalist Party (KMT).⁶⁵

Another example that demonstrates the operation of the East-West antagonism is found in Kaiwei's account of the media's influence on the formation of his Chinese identity. Kaiwei states that his strong attachment to the Chinese people results from watching kung-fu movies that are set in the late Qing and the early Republican periods. In these historical dramas, unsurprisingly, the benevolent, brave, and heroic characters are Chinese people, whereas the villains are usually either Westerners or Japanese imperialists. Bruce Lee's famous movie, *Fist of Fury* (精武門), made in 1972, is a prime example. Lee plays a young kung fu apprentice, Chen Zhen 陳真, who investigates his master's death and finally takes revenge on the perpetrators, a Japanese kung-fu master and members of the Russian mob. It should not be coincident that Japan and Russia happened to be the two main threats at China's border in the late nineteenth and the early twentieth century. Another popular kung-fu movie, *Ip Man* (葉問), from 2008, features actor Donnie Yen, who also takes on the Japanese as the villains of the story. The climax of its second episode, shown in 2010, is an international martial arts contest organised by English promoters, where the main character Ip Man beats an arrogant, racist, and brutal British boxing champion named Taylor 'The Twister' Milos. There is a common thread, seen in scholarly analyses, pop culture entertainment, and people's accounts of daily life. It is these historical backgrounds with similar plot formulas, the same two ethical opposites, and the same moral scenario, namely, valiant Chinese pitted

⁶⁵ See footnote 60; for Chinese leaders, Japan's imperialist image was important fuel for war mobilisation and development of Chinese nationalism over the Second World War. Also, anti-imperialist discourse appeared in the mutual denunciations between the Chinese Communist Party (CCP) and the KMT during the Chinese civil war (prior to World War II), when the CCP accused the KMT of being the confederate of American imperialists, and the KMT accused the CCP of being the confederate of Russian imperialists.

against cruel foreign oppressors. This narrative of East-West antagonism adequately captures many aspects of Chinese identity as professed by Haoping and Kaiwei: When identifying themselves as Chinese, they reference the concept of Easterners.

Emotional Co-ordination of the East-West Antagonistic Narrative

I present one of my fieldwork participants, Jane, a 33 year-old *waishengren* lady, to serve as a fitting case to demonstrate how moral dualism induces strong emotions in the form of warm, positive feelings for those perceived as benevolent and negative ones for those seen as malevolent. Jane was born in the US in 1977; her family's ability to live a transnational life in a modern developed country implies an above-average standard of living. Her parents decided to bring her back to Taiwan for her early education, a decision that Jane attributes to their strong Chinese identity.⁶⁶ Jane spent most of her childhood in Taipei. At the age of 18, she returned to the US to attend college; she came back to Taiwan to work after graduation. She is now married to a *benshengren* who had been her classmate in primary school in Taiwan. Jane suggested an upscale restaurant at the centre of Taipei City as the venue of our interview. Asked to describe her identity, Jane claims that she is both Chinese and Taiwanese without prioritising either. Her case is unusual, as almost every other subject who claimed a dual identity prioritised the Taiwanese identity over the Chinese one. The following examples from her interview show her fervent nationalist sentiments towards China and Chinese people. The first is her reply to the question: 'Do you feel proud of being Chinese?'

JANE: I feel pretty proud [of being Chinese]. We can't choose the colour of our skin nor our race. Since you belong to this race, you have to be proud of your race [...] We have five thousand years of

⁶⁶ In the interview Jane explains why she received education in Taiwan: 'My mother sent me back to Taiwan (for my early education). She said to me that I'm Chinese and I cannot change that fact. Since I'm Chinese, I shall have certain standards of understanding, speaking, reading, and writing Mandarin'.

history. We invented many things: the compass, gunpowder, etc. We invented these, and should feel proud. We Chinese people are preeminent in many aspects, because we are pretty smart. Why not be proud of being Chinese? If there is anyone reluctant to be Chinese, I think it is because he or she is under great pressure from racial discrimination. This discrimination results from white people's arrogance and self-conceit. After all, China was so weak in the period of the Qing Dynasty. The Eight-Nation Alliance bullied and embarrassed us excruciatingly. Because opium use was prevalent at that time, China and the Chinese people fell apart. Then white people arose, so they had self-conceit and pride in their race. If China had not been so weak and so miserable, if China had been very powerful and unrestrained, China would not be the China that exists today; China would be a superpower, and we would not be discriminated against anywhere.

Next, when we discussed the boycott movements in China against foreign commodities, Jane had this to say:

JANE: [...] When dealing with problems with other countries, such as Korea, for instance, they (the Chinese) might boycott the goods of Korea, or Japan. They (the Chinese) would use this method. It is because we have too much historical feeling (love, hatred, amity, and enmity [*ai-ben-qing-chou* 愛恨情仇]), and that's why they use the term 'China' as an excuse (a tool) to mobilise people and to provoke nationalist sentiments. Well, it's not an excuse... I think it is necessary, because we are Chinese. [...] We know about the painful events of history, like the Nanjing Massacre. I think a nation is made by its history, by what it has passed through, and we certainly should maintain and support our national characteristics. Otherwise, why should we be Chinese? Today, you are Chinese, and you should have a sense of belongingness. Therefore, when people say that we have to boycott Japanese goods because the Japanese have bullied us Chinese for too long, I think it is okay.

Consider also Jane's opinion on Tibetan independence:

Q: Do you support Tibet's independence?

JANE: Of course not! Because, I think, if they are independent... Well, take Taiwan as an example... How many ethnic groups are there in Taiwan? Are you going to allow all of them to be independent? If so, Taiwan will be divided! How should you divide the land? Drawing boundaries according to some mountains? [...] It's impossible. I think supporting independence just because of ethnic differences is irrational.

Q: But, isn't the situation of Tibet different from that of Taiwanese aboriginals?

JANE: Yes... the culture of Tibet is quite historic... The ethnicity and culture of Tibet are quite different from Taiwan's. [...] They have many 'pure' Tibetans; their ancestors were not hybridised with Han. And they preserve their culture quite well... [...]

Q: Even so, you would not support their independence?

JANE: No, I would not. Because, I think if Han, Manchu, Mongol, Hui, Tibetan, Miao, and Yao all seek independence, then China will be divided. How can you distinguish who is Tibetan and who is Han, nowadays? We have gone through five thousand-years [of Chinese] history, and there can't be 'pure' Han blood running through anyone's veins. If you seek independence just because of certain political reasons, China will collapse! China's collapse won't benefit anyone.

In addition to her concern about China's fall, Jane expresses compassion for the 'miserable' history of Chinese people:

JANE: [...] If China divides, you will have no resources and become separate countries. It will be very difficult to feed 1.3 billion people then. Pursuing separatism and making all miserable will benefit no one. Uniting together is the only solution. China has suffered for too long. It has been an oppressed nation. It is still being bullied in international society.

Q: For instance?

JANE: America. Yes, American has been bad to China. The US does not want to see China get strong, so it poses many obstacles for China and provokes many conflicts between Taiwan and China.

Q: Did you feel this oppression when in the US?

JANE: I only felt racism in the US. I didn't experience conflict with the Chinese (Mainlanders), no.

Q: I mean... you said that Chinese were being bullied ...

JANE: Yes, that is; in the form of racism.

Each of these three conversations shows the operation of the ethical narrative of East-West antagonism—the villains in her narratives are Westerners, Americans and Japanese—the notorious advocates of imperialism in modern East Asian history, and they keep trying to satisfy their greed by exercising their influence on contemporary world issues. Yet what's more important is that these interviews reveal how the East-West antagonistic narrative informs her strong feelings about the concepts of Chinese, Easterners, and Westerners. These feelings can be roughly classified into two categories, corresponding to the dichotomy of good and evil: On the one hand, feelings for the benevolent are apparent in her pride in being Chinese, her anxieties about China's potential division and collapse, and her great concern for its territorial integrity (as in her discussion of Tibetan independence). On the other hand, her feelings for the malignant emerge in her antagonism towards and resentment of racist foreigners and imperialist

invaders. Put another way: Jane's feelings for these generic ideas are tightly bound with the East-West antagonism.⁶⁷ Her case clearly shows how closely intertwined are identity, meanings, ethical narrative, and feelings.⁶⁸

The Influences of Historical East-West Antagonism, Chinese Identity, and Political Stance on the Issue of Unification/Independence

Jane's conceptualisation of 'Chinese', delineated by the national boundary of the Chinese nation in her aspiration, further supports the theoretical association I am making among ethical narratives, meaning, and identity. When explaining her Chinese identity, Jane draws first on racial discourses, kinship concepts, and origin myths, stating: 'If you have yellow skin, black eyes and black hair, and your ancestors came from China, you should be Chinese'. Later in the interview, however, she clarifies, excluding Japanese and Koreans from the category of Chinese, despite their similar racial phenotypes. She explains that these two groups might originate from China, but 'they are not called "Chinese" any longer; they have their own nationality now'. Apparently, Jane's conceptualisation of Chinese identity (who is Chinese and who is not) is not only defined by racial discourses; the national boundary also exercises significant influence, according to which she excludes Japanese and Koreans from Chinese nationality. However, it is neither the current PRC nation (mainland China) nor the current ROC (Taiwan), but the image of a fictional nation that does not currently exist, a nation whose territory comprises both those places. It is a nation of imagination, a nation of the past, that is

⁶⁷ Moreover, the East-West antagonistic narrative also suggests moral actions corresponding to the moral dualism. As with Jane's interview, these can be boycotting Japanese commodities, uniting Chinese people (including all ethnic minorities) altogether, making the Chinese nation stronger and alive (keep it from collapse), and fighting against global racist discrimination.

⁶⁸ Actually, in Jane's case, the East-West antagonism is not alone in contributing to her Chinese identity. The anti-DPP (Democratic Progressive Party) narrative seems to exercise an equally strong influence. Her resentment of the DPP did not appear to be any less than her antipathy to the Westerner in her interview. The anti-DPP narrative is discussed in the later section.

instinctual in Jane's affections, and whose integrity she passionately cares for, because its national boundary, drawn according to the dominion of the Qing Empire, demarcates the nation as it was before the incursions of Western imperialists. Jane's China, shaped like a begonia leaf, includes not only Taiwan (which was ceded to Japan in 1895) but also Mongolia (which claimed its independence in the 1920s). In turn, her conceptualisation of Chinese identity is defined by the territory of the nation she aspires to, and the territory of this nation is delineated by the East-West antagonistic discourse and reinforced by the strong emotions that go along with that discourse.

This type of feeling growing out of moral dualism also plays a significant role in Jane's political views and attitudes towards the current situation. While her opinion on Tibetan independence is one example, her attitude towards Taiwan's future also attests to the importance she attributes to the integrity of the Chinese nation:

JANE: I think unification with China is a necessary route, because, from the point of view of China, they will certainly not allow Taiwan to be independent ...

Q: Why not?

JANE: Why should they? China has claimed that they would rather let one hundred million people die than surrender one inch of territory. Now they have retrieved Macau and Hong Kong, and the last [lost territory] is Taiwan.

Q: Territory ...

JANE: Territory is very important to every country. Otherwise, why does everybody fight for the Senkaku (Diaoyutai 釣魚臺) Islands? They are only little islands. But they are territory, and territory concerns national dignity, which does not allow compromise. If they (China) allow Taiwan to be independent today, and then Tibet is independent, Xinjiang is independent, Yunnan is independent, every province is independent; then the mainland (China) is divided! A divided mainland does not benefit mainlanders.

When discussing Taiwan's future, Jane does not take the viewpoint of Taiwan or its people but that of China (mainland) or Chinese people (mainlanders). However, it is not because Jane traitorously rejects being Taiwanese when reflecting on this issue. It is because her strong emotions are dictated by the East-West antagonistic narrative. More

precisely, Jane does not really oppose and reject Taiwanese identity; it is the worry and fear for the division and collapse of the Chinese nation that prompt her to take such a position. Her reason for opposing Taiwan independence once again supports the East-West antagonism analysis and manifests the potency of her feelings:

Q: If, in a very ideal circumstance, China would allow Taiwan to be independent and would maintain all forms of economic interaction and not oppress Taiwan, would you support Taiwan independence?

JANE: It depends ... People say that the twenty-first century is the century of the Chinese ... I think it depends on whether Taiwan can have its share ... If China treats Taiwan as it treats the US—that is, there might be some preferential treatment for some firms, but generally taxes are high—Taiwan would not be able to sell goods to China, or the goods would be too expensive (because of the taxes), and then what should Taiwan do?

Even in the most ideal situation—one that favours Taiwan independence—Jane still opposes the option. Her opposition is not entirely from the standpoint of China, longing for the integrity of a greater Chinese nation. Rather, she takes Taiwan's benefit into consideration, expecting Taiwan will receive its fair share when China turns into a world superpower. Therefore, what is important in Jane's case is not which position she takes or whose benefit she attaches greater weight to, but the particular feelings that lead her to her stands—that is, the feelings that are generated by the East-West antagonistic narrative. When Jane explains her support for unification, the East-West antagonistic narrative is operating, inducing her feelings of worry and fear for China's collapse. When she states her opposition to Taiwan independence, that discourse is at work again, provoking a feeling of excitement at the prospect of China and Taiwan, together, achieving a supreme status over all other countries of the world in the new century.

The influence of the East-West antagonistic discourse can also be found in Haoping's views on Taiwan's future. Here he explains why he supports Taiwan's unification with China:

HAOPING: Because... the population of daluren is very large; if properly utilised, it is possible for us Chinese people to dominate the world. [Laugh]

Q: But why is dominating the world important?

HAOPING: If we dominated the world, we wouldn't have to depend on foreign countries. Right now, we follow Americans in many aspects, such as technology and weapons. Usually, they develop something first, and then we copy or purchase those from them. They are foreigners after all; we might become a puppet if they control many things. [...] The other thing is that I hate learning English. I want the whole world to learn Mandarin! [Laughs]

Haoping's vision of unification is not based on careful and thorough deliberation on the future political or economic benefit of Taiwan, but on the yearning to dominate the world; it is a backlash against the sense of backwardness and incompetence compared to the Western countries. In other words, what dictates Haoping's attitude on Taiwan's future is not rational calculation but, once again, the feelings induced by the East-West antagonistic narrative.

The China-Taiwan Antagonistic Narrative

The cases of Haoping, Kaiwei, and Jane show that, with regard to Chinese and Taiwanese identities in Taiwan, the East-West antagonism is one of several discourses that attract people to adopt certain identities by offering them an ethical narrative and a persuasive set of emotional coordinates. For other people, other discourses might have greater appeal. Another subject referenced previously, Yuxin,⁶⁹ gives credence to a discourse I call 'China-Taiwan antagonism'. Unsurprisingly, the benevolent element in the China-Taiwan antagonism equation is Taiwanese people, while the malignant counterpart is Chinese people or, more precisely, people of the PRC.⁷⁰ Yuxin's

⁶⁹ Yuxin was born in Taipei in 1992. She is a *waishengren* and, at the time of her interview, studying in a Taipei university. When it comes to identity, Yuxin unambiguously identifies herself as Taiwanese only and rejects Chinese identity.

⁷⁰ As presented in the previous chapter, for instance, Yuxin thinks of herself as one part of *Zhonghua-minzu* (the supra-ethnic Chinese nationality), but to her, Chineseness is limited to people of the PRC.

resentment towards China/Chinese is explicitly expressed in her selection of identity: She regards herself as Taiwanese only and rejects Chinese identity, stating firmly in the interview: ‘I don’t want to have any relations with “*Zhongguoren*” (中國人; Chinese people)’. She uses the word ‘hatred’ to describe her feelings towards China because, in her perception, China (the Chinese Communists) has been a dangerous enemy of Taiwan since the late 1940s. To her knowledge, the Chinese Communist Party (CCP, representing China) drove the Nationalists (KMT, representing Taiwan) off the mainland, and continued to fight them in skirmishes across the Strait for several years afterwards. Even now, conflicts between the two states⁷¹ have not ceased: she sees China (the CCP) oppressing Taiwan and trying to exclude Taiwan from international politics. Being forced to use the name ‘Chinese Taipei’ in international forums is a case in point that bothers her.⁷²

Accordingly, one of the moral actions inspired by the China-Taiwan antagonism can be rejecting future unification with China, as Yuxin does in her interview, while expressing strong feelings against China/Chinese people:

Q: Do you support unification or Taiwan Independence?

YUXIN: Do you mean unification with China? Of course not! I said that I’m Taiwanese, how could I possibly choose unification? That would be contradictory. [...] Of course Taiwan should be separate from China. [...]

Q: Why don’t you support unification?

YUXIN: Why unification? Unification feels like we are going to be merged as one. This is not good. What if those Chinese students overrun Taiwan, scrambling for jobs and school admissions? That would not be good. They have so many people. How terrifying.

Q: If China’s development reached a high standard and it was also democratised, would you support unification?

⁷¹ Yuxin views China and Taiwan as two different separate states.

⁷² Yuxin stated in her interview: ‘Chinese Taipei ... it just does not feel like Taiwan! It is because China does not like us to use “Taiwan” and thus asks us to change the name. This is how we compromise, and I don’t like it; this is bullying!’

YUXIN: [You mean] when they become exactly the same as us Taiwanese people? They would definitely not be the same. Since we are geographically divided, then [let us also be politically] divided. I think I would not support unification. Even if they become just like us, it would feel strange to me.

Q: How strange?

YUXIN: Our thinking must still be different. Their economic situation is good now, I know, but it is not entirely good. There is a huge difference between the eastern part of China and the western. The situation in Taiwan is okay; we don't have such serious problems.

Yuxin is not able fully to clarify the reason why she rejects unification with China. Even under the most ideal condition, that is, conceiving that China would be economically comparable to Taiwan and democratically reformed, she still rejects being merged into one country. Her final explanation comes down to feelings: She refuses unification just because she does not like the idea, because it feels strange, because she has very bad impressions of Chinese people and prefers being differentiated from them. Clearly, the feelings induced by the China-Taiwan antagonism inform Yuxin's attitude towards the unification/independence issue.

Two More Attributes of the Ethical Narrative: The Value of Justice and the Influence of Early Life Experience

Yuxin's accounts bear out the significant role that emotions play in identity formation. In the interview, she shows only her intense emotional attachments for Taiwan, without any sort of nationalist sentiment for China. More precisely, unlike Haoping and Jane, Yuxin does not express any worry about the division of the Chinese nation at all during her interview. She has no concern for the Chinese nation's territorial integrity, and she feels it unnecessary to be in an alliance with China against the Western powers. Nonetheless, Yuxin is conscious of certain elements in the East-West antagonistic narrative: She is aware of China's miserable history in the late nineteenth century and the idea of the supra-ethnic Chinese nationality as Easterners. Her resentful feelings towards foreign

imperialists (a sign of the East-West antagonistic narrative operating) are explicitly presented when discussing movies such as *Ip Man*:

Q: Do you like *Ip Man*?

YUXIN: It's not bad. His [the main character's] kung-fu is great. Donnie Yen is awesome!

Q: How about the story?

YUXIN: It's once again about Japan.

Q: So?

YUXIN: It makes me dislike the Japanese. I especially detest the Japanese in that period.

Q: In that period? So, you don't detest the Japanese now?

YUXIN: I just don't want to argue about that (the brutal deeds of the Japanese in World War II) [now], but when watching this kind of movie, I still feel adverse to them.

Q: Why?

YUXIN: Because the Japanese at that time were oppressing the Chinese people. Not only the Chinese people but also us Taiwanese people. That's objectionable.

Q: For instance? What do you mean by oppress?

YUXIN: The Nanjing Massacre! They (Japanese) were so inhumane then.

Q: How about the Taiwanese?

YUXIN: Occupation. They occupied Taiwan. I really dislike that. But now, it is all in the past, after all. I don't belong to that generation; the generation of that period would probably hate them.

Her accounts reveal two important characteristics of ethical narrative. The first is the primary value of justice in this narrative, which is manifested in its basic formula of dualistic antagonism between the oppressing malignant and the oppressed benevolent. Whether it is the East-West or the China-Taiwan antagonistic discourse, the plot is always one involving a large, powerful, faction brutally oppressing a smaller, weaker, virtuous one. This common theme is the key to Yuxin's willingness to accept both discourses despite their different features: In other words, what Yuxin gives greatest weight to is not any particular content or characters in antagonism, but the value underlying these moral dichotomies, namely, justice. And this is also what enables Yuxin to experience simultaneously two very polarised feelings, namely, sympathy and enmity, towards Chinese.

The second chief characteristic of the formation of ethical narrative is the role of early life experience. While accepting, and being able to identify with, both the East-West antagonistic and the China-Taiwan antagonistic narratives due to the emotional resonance that their common theme—justice—holds for her, Yuxin gives the China-Taiwan antagonism much greater priority. She does not identify herself as Chinese—that is, she does not position herself as Chinese in the ethical narrative of the East-West antagonism. Rather, she brings Taiwan/Taiwanese into the tumultuous history of the late nineteenth century and regards both the Chinese and the Taiwanese, equally, as victims of Western imperialism. Why does the China-Taiwan antagonist discourse hold a greater attraction for Yuxin than the East-West antagonism? Why do kung-fu movies such as *Ip Man* arouse stronger emotions for Haoping and Jane than for Yuxin? The answer seems to lie in each individual's past experiences. As explained in the previous chapter, on the one hand, Yuxin was exposed to the newer versions of history textbooks because she was born after 1991,⁷³ and this might have contributed to her conviction that China and Taiwan are two different and rival countries. Furthermore, she has been hearing in the Taiwan media how China throws its weight around, oppressing Taiwan on the international stage. On the other hand, Haoping, who is ten years older than Yuxin, received the old-fashioned national education promulgated by the KMT, which put more emphasis on the promotion of Chinese nationalism and the construction of the collective concept of the supra-ethnic 'Chinese'. Jane, of the same generation as Haoping, also received this nationalist education, but her idea of the East-West antagonism has been significantly tempered by her stay in the US, where she experienced racial discrimination from white 'Westerners'.

⁷³ School textbooks were allowed to have different versions and to be edited by private publishers after 2000, which suggests that the content of textbooks should be less monopolised by the government than before. Moreover, from that year, primary schools do not teach students social studies until they are in the third grade (age of 8), and it means, generally, all students in Taiwan who were born after 1991 should be taught with newly edited textbooks at their third grade.

The Anti-KMT Narrative (and the Passion for Taiwanese People)

This China-Taiwan antagonistic ideology has the potential to connect with the anti-KMT discourse, the third ethical narrative discussed in this chapter. In this narrative, the oppressing malignant is the KMT, while the oppressed benevolent is the Taiwanese people.

My interview with Yen exemplifies this discourse. He was born in Tainan in 1980 and has an older sister. His father and grandfather are wholesale fruit traders in Tainan; they have run this business for more than sixty years. Yen has spent all his life in Tainan, receiving his compulsory education there and then obtaining a PhD degree there as well. Having just graduated, he runs a cram school and enjoys good quality of life and social status as a teacher in his hometown.

The first striking feature of Yen's interview is his passionate feelings, particularly sympathy for Taiwan, which play the most significant role in his exclusive choice of Taiwanese identity:

YEN: To me, it seems that the land of Taiwan ... I mean, Taiwan is so small, and China is so big. If you keep emphasising that you belong to the big, you live on that big land, and you are one part of the big whole ... what does the small piece mean to you? If no one speaks up for this land, who would support this land? I of course say: 'I'm Taiwanese'. At an international event, saying 'I'm Taiwanese' will, at least, let others know there is a piece of the world called Taiwan.

His response also reveals the China-Taiwan antagonistic narrative at work, for what he offers in comparison to 'small' Taiwan is China, its large rival. This moral dualism between Taiwan and China appears more clearly in Yen's discussion of Taiwan's future:

YEN: As long as there is no war. The most important thing is that you shouldn't use war to take over any place. You shouldn't use threats to take over places. It should not be like [China saying]: 'OK, if you don't allow me to take over, I will launch missiles at you and destroy your economy'. This is not good.

Menacing is not good. You should take over naturally, or by everyone's consensus. Sit down and negotiate. You don't offend my sovereignty, and I don't occupy what belongs to you.

Yen places importance on regional security and peace and supports maintaining the status quo; he can accept future unification with China, as long as the whole process is peaceful and mutually beneficial. Nonetheless, Yen clearly perceives and imagines China as the preeminent rival of Taiwan and, when considering Taiwan's future and the relationship across the Taiwan Strait, he puts much emphasis on sovereignty, mutual interests, and respect. To Yen, China seems always to be a potential threat with high potential to use its force to threaten Taiwan and to abuse Taiwan's sovereignty.⁷⁴

The tight interweaving of the anti-KMT narrative with the China-Taiwan antagonism can be witnessed in Yen's following comments:

YEN: Now the [Taiwan] government wants to curry favour [with mainland China], so it opens the market for the mainlanders and gradually lifts the barriers. They even argue speciously that it will benefit Taiwan. I don't really think so. [...]

Q: So, you dislike the KMT because it favours China?

YEN: Yes. Some of their ideas and policies make me feel ... [as if] they are favouring that side. To them [the KMT], Taiwan is just like a disposable accessory.

Q: Okay.

YEN: And in international settings, your [Taiwanese] voice cannot be heard. Our sovereignty is belittled. For instance, at some sport occasions, why can't we show our flag? Don't we in Taiwan have any sovereignty? I'm not saying have a war with China. But, we have to maintain our sovereignty! And I feel that our government does not try to maintain that.

Yen has a very negative impression of the KMT, and one of the main reasons for this is his perception that the policies of the current KMT regime favour China rather than the best interests of the Taiwanese people. He thought that the free trade agreement that the

⁷⁴ Yen's and Yuxin's differing opinions on Taiwan's possible unification with China suggest that, when it comes to the issue of Taiwan's future, the China-Taiwan antagonistic discourse is not the determinant factor. Both of them feel a clear resentment towards China, but they take different positions regarding unification/independence. This shows that, although the moral dualism of a discourse rests on one guiding principle (in Yuxin's and Yen's cases, the moral principle of the China-Taiwan antagonism is to resist China's oppression and to support Taiwan), it can lead to different perceptions of the moral course of action (such as Yuxin's adamant rejection of unification with China or Yen's strong emphasis on promoting Taiwan's sovereignty and interests).

KMT government was ready to sign with China at the time of our interview would benefit China's economy more than it would enhance the Taiwanese people's daily life. Further, when China insulted Taiwan's sovereignty, the KMT government was unable or unwilling to fight back. In Yen's perception, the KMT regime and China seem to share common interests that were not in the interests of the people of Taiwan.

Yen has other reasons for detesting the KMT. In his view, the KMT brutally dominated the Taiwanese people for many decades after coming to Taiwan. He gives the 228 Incident⁷⁵ and the White Terror as examples, describing how many Taiwanese people had been cruelly oppressed, jailed, or killed by the KMT government. His accounts clearly reveal his anti-KMT ideology: the KMT is the cruel and corrupt oppressor, and he feels a moral imperative to resist the KMT regime and support the Taiwanese people. For Yen this means refusing to vote for the KMT, and he has indeed persisted in this practice: since he has been eligible to vote, he has not cast a single vote for KMT politicians. Apparently, what drives Yen's voting is not rational calculation but his fervent emotions, more precisely, his loathing and resentment of the KMT (and what goes hand-in-hand with this resentment is his passionate love for the people/nation of Taiwan).

But Yen also has formed a poor impression of the opposition party, the DPP (Democratic Progressive Party). For instance, Yen believes that the DPP, just like the KMT, manipulates the provincial-origin issue in elections:

YEN: In that year (2008), everyone got radical. You got radical, so then we got radical. The two sides [KMT and DPP supporters] were literally ... hating each other during the presidential elections that year. Very obviously!

⁷⁵ The 228 Incident was a large-scale resistance of people against the KMT government occurring in late February 1947. It was deemed as the most violent provincial-origin conflict in Taiwanese history. The incident ended up in brutal oppression by the KMT government. See Robert Edmondson, 'The February 28 Incident and National Identity'. In *Memories of the Future*, 25–46, edited by Stéphane Corcuff (London and New York: M.E. Sharpe, 2002); and Edward Vickers, 'Frontiers of Memory: Conflict, Imperialism, and Official Histories in the Formation of Post-Cold War Taiwan Identity'. In *Ruptured Histories*, 192–208, edited by Sheila Miyoshi Jager and Rana Mitter (Harvard University Press, 2007).

Q: Was that opposition more between the two political parties, or between the two ethnicities [*waishengren* and *benshengren*]?

YEN: Opposition between the two political parties was more obvious than ethnic opposition, but there was ethnic conflict, too. Because ... what they appealed to was 'Taiwanese people should stand up'.

Q: You mean, the DPP?

YEN: Yes, 'Taiwanese people stand up', 'hand in hand, protect Taiwan'. They more or less dragged the ethnic issue into these appeals.

Yen's account implies his dissatisfaction with the DPP, and he offers traditional sayings such as 'if there is no fish, shrimp is okay' and 'you have to choose a better one from two rotten apples' to describe his sense of having no choice but to vote for the DPP. He feels trapped, and that his love for his country has been 'hijacked' by the DPP—in order to love Taiwan, he has to vote for the DPP's candidates despite his disappointment in the party. If he does not support the DPP, then the KMT, the party he greatly abhors, will win the election. In other words, Yen cares less about the specific policies and political visions projected by candidates; what he prioritises above all is preventing KMT candidates from winning elections. To Yen, the anti-KMT discourse is so powerful that it forges and shapes his approach to politics in Taiwan; under the influence of this discourse, voting for the DPP becomes an important means of actualising his love of Taiwan.

The Anti-*waishengren* Narrative

In the accounts of some of the people I interviewed, the anti-KMT narrative is also closely entwined with anti-*waishengren* ideology, which is based on the moral dualism between the *waishengren* and *benshengren* groups in Taiwanese society. The discourse suggests that the *waishengren*, relying on the incontestable administrative power and resources possessed by the KMT government, have been belittling, bullying, and

exploiting the Taiwanese people (*benshengren*), ever since they came to Taiwan with the KMT in the late 1940s.

The case of Weiting explicitly demonstrates the operation of these narratives. He was born in 1955 (he was 56 years old at the time of our interview) in Yunlin 雲林, a very poor agricultural county in the middle region of Taiwan. His grandfather was a farmer in the Japanese colonial period, yet Weiting's father struggled through the class barrier in the society and eventually graduated from a teacher's university during the Japanese occupation. He continued his teaching career after the KMT took over Taiwan and was promoted to principal of a primary school before retirement. Weiting, like his father, won admission to National Taiwan University, the best university in Taiwan, and studied in the Foreign Language Department in the early 1970s. He went on to become a private school teacher, teaching English to senior high school students.

Weiting fervently identifies himself as Taiwanese only, and he opposes the Chinese, as he has always done, and now,⁷⁶ he is opposed to *waishengren* as well. He is one of my research subjects who equates the term 'Chinese' with '*waishengren*' and 'Taiwanese' with '*benshengren*'.⁷⁷ He recalls that, in the past, 'Taiwanese' had never been used to include *waishengren*, but only referred to *benshengren* in Taiwanese society. In keeping with this dichotomy, Weiting deems *waishengren* to be the antagonistic other to Taiwanese (*benshengren*) and believes they have been bullying the Taiwanese people since arriving in Taiwan. His resentment of *waishengren* is particularly apparent in his description of the experience of his aunt:

WEITING: I give you an example. My aunt, that is, my father's sister, she was raped by my uncle, who is a *waishengren*. She would not dare to speak about it until now. Now she is seventy-something and only

⁷⁶ I stress "now" because in the past, Weiting would not have seen 'Chinese' as adverse to 'Taiwanese'. Rather, he used to include Taiwanese into the concept of Chinese and identify himself as Chinese. Not until his 20s or 30s did he stop regarding Taiwanese as included in Chinese and, consequently, changed his professed identity from Chinese to Taiwanese.

⁷⁷ Other similar cases are, for instance, those of Lan, Takala, Liang, Anhui, Matian, Chenli, discussed in Chapter 2.

now willing to tell this sad story ... He raped her. She would not dare to admit being raped before and insisted on marrying him [because she thought she had no choice but to marry the man who took her virginity]. Now you know why Taiwanese people hate *waishengren*: they raped, debauched, robbed, and exploited Taiwanese people (*jianyinlulue*; 姦淫擄掠). They were disorderly, untidy and uneducated. [...] Her family could not understand and were very angry at her decision. My grandfather and grandmother said: 'If you marry a *waishengren*, we will break your leg'. But she insisted ... [and] kept this secret for forty years! ... How sad it is!

Weiting also talks about the '228 Incident' of 1947,⁷⁸ which he perceives as a conflict between *waishengren* and *benshengren*:

WEITING: Another example is the 228 Incident. My mother's aunt was killed then. They were massacred.

Many people died in Yunlin County. That's why ... [we] gradually came to hate *waishengren*, why there is provincial-origin enmity after one, two or three years. Do you understand?

Q: After one, two or three years?

WEITING: 1947, 1948 ... It's no later than 1951,⁷⁹ [we] had been hating [*waishengren*]. That's why [we] call them '*waisheng-zhu*' (外省豬; literally, pig from other provinces). [And it was around 1951 that the] *waisheng-zhu* started to circulate in the society. Yes, you can write 'around 1951' in your thesis. I was born around the 1950s, and I heard people saying '*waisheng-zhu*' when I was a child. Now I am 55 years old. No one would use this word, not in two or three decades. [Younger] generations ... would not hear this word; the society has become more integrated. However, as I said, have they [*waishengren*] changed their identities? No, they will not. They cannot identify as [being] Taiwanese. They still think they are Chinese. We Taiwanese think we are Taiwanese and we have been bullied [by them], and we have had resistance and democratic reforms in these past two or three decades. Otherwise, the KMT would be continued its dictatorship and its oppression of the Taiwanese people.

Further, this moral dualism of the anti-*waishengren* narrative is tightly bound with Weiting's opposition to the KMT regime. His analysis of Taiwan's elections manifests this connection:

WEITING: Taiwanese and Hakka account for eighty percent of Taiwan's population, and *waishengren* make up the remaining twenty percent. Why has the KMT always won elections? The fact is: that population logic is wrong. When a *waishengren* marries a *benshengren* wife, they [*waishengren*] and the

⁷⁸ See footnote 75.

⁷⁹ Here Weiting is constructing Taiwan history (or more precisely, describing the history that he perceives and believes). What he strongly suggests is that the disparaging term '*waisheng-zhu*', along with the provincial-origin enmity in Taiwan, had existed for a long time (since before he was born). However, he is aware of his lack of evidence for his impression. This is the reason he uses the word 'gradually' in his account, and refers vaguely to multiple years.

KMT) gain one more vote. When [the couple] has their children, usually two, they get two more votes. In other words, one *waishengren* can thus draw three more votes for the KMT. That's why the KMT always win sixty percent, and the DPP only forty percent. Do you understand? People say the eighty-percent Taiwanese cannot beat the twenty-percent *waishengren*. Their logic is wrong! *Waishengren* are sixty percent, and Taiwanese are actually forty percent. When *waishengren* men marry Taiwanese women, their whole family becomes *waishengren*. How about *waishengren* women marrying Taiwanese men? [...] I'm sorry, the whole family become *waishengren* then, too.... *Waishengren* girls are pretty and eloquent. They are clever and ambitious, so their husbands get assimilated, and their children get assimilated, too!

One point worth noting in this passage is that Weiting's conceptualisation of '*waishengren*' does not refer simply to a particular demographic group that came from the mainland in the late 1940s and their descendants. Rather, it refers to people who share a common ideology, the people who support the KMT party. He has coined a generic term '*sixiang-waisheng*' (思想外省; literally, ideological-*waisheng*) later in the interview to refer not only to the *waishengren* ethnic group specifically but also more generally to KMT supporters and Chinese-identifiers. This provides ample evidence that to Weiting, the anti-*waishengren* discourse is so powerful that it has become his primary emotional and cognitive scheme by which to comprehend Taiwanese society. That is, he simply divides people of Taiwan into *waishengren* and *benshengren*, which he equates with KMT supporters and DPP supporters. He neither manages to comprehend the diversity within either group, nor realises that people may have different reasons for supporting a political party. Under the profound influence of the anti-*waishengren* narrative and the anti-KMT narrative, Weiting is reluctant—if not unable—to imagine the viewpoint of his other (*waishengren* and KMT supporters). Another passage from his interview offers more support for this argument:

Q: What's the characteristic of these '*sixiang waisheng*' people?

WEITING: [They say] 'Great China'. 'I'm Chinese'. Well, as I said, you cannot say they are wrong. This cannot be judged as right and wrong. They think they are right, and you think you are right. You cannot persuade me, and I cannot persuade you. [...]

Q: But, hasn't this idea (Chinese identification) changed in the society?

WEITING: Well, if you ask about the society, I think, almost eighty percent of Taiwanese would identify with Taiwan and think that Taiwan is not a part of China. Despite the influence of intermarriage, people would identify with Taiwan. They are just persuaded by their husbands or wives or relatives to support the KMT. They do not identify with China. [...] They may think of themselves as Chinese, but this idea is not firm. They would identify themselves as Taiwanese. [...] But they would vote for the KMT. They would be ... a little ambivalent.

Q: You just said the characteristic of these '*sixiang waisheng*' people is the ideology of Great China, but now you say they are ...

WEITING: That's right. They have the 'Great China' ideology, but in their sub-conscious, they think of themselves as Taiwanese. Thus they are ambivalent.

Q: So, they would not support unification with China?

WEITING: No, absolutely not. Don't worry. People supporting unification are less than twenty percent of the population.

Again, Weiting tries to use his provincial-origin theory to explain the Chinese and Taiwanese identities in Taiwan, but this time he fails. And when it becomes clear that his explanation—that sixty percent of Taiwanese people are 'ideologically-*waisheng*' who support the KMT and embrace the 'Great China' ideology—does not correspond to the reality—namely, that the majority of Taiwanese people would oppose unification with China—he does not revise his theory but concludes, inconsistently and carelessly, that most Taiwanese are 'sub-consciously' and 'ambivalently' identifying with Taiwan.

However, Weiting has had no experience of any significant provincial-origin conflict in his own life. The ethical narratives he subscribes to were transmitted to him through the stories he heard told by others:

Q: Did you ever encounter any provincial-origin conflict yourself when you were little?

WEITING: I remember there were a few conflicts mentioned in my childhood, but there was no huge event.

Q: A few?

WEITING: A few. That is, sometimes people would say, ah, those are *waishengren*, and we are Taiwanese. Sometimes they did that.

Weiting has never experienced serious conflict with *waishengren* in person. He is only aware there is such a classification, and this awareness comes to him from others' sayings. This explicitly shows the fictional dimension of ethical narrative: Individuals need not actually have experienced the events described in the narrative; the adoption of a particular narrative can be mediated and influenced by third parties, such as family members, friends, school teachers, and so forth.

The potentially invented character of the ethical narrative reveals a disturbing fact: Since Weiting's anti-*waishengren* discourse has been taught to him by others and he has no personal knowledge of it, his worldview—more specifically, his knowledge of Taiwanese society and politics—can be constructed with great bias and remoteness from reality. In fact, as discussed above, Weiting wrongly interprets the current condition of Taiwan: He incorrectly equates *waishengren*, KMT supporters, and unificationists, and has to contrive concepts such as '*sixiang-waisheng*' in an effort to salvage his problematic theory. He is not curious as to why some people in Taiwan would support the KMT and the unification with China; what is important to him is to embrace the anti-*waishengren* and anti-KMT discourses as fundamental principles of his life, guiding all of his political judgments and actions.

The Anti-DPP Narrative⁸⁰

Some interviewees rejected a Chinese identity based on the anti-KMT narrative, while other interviewees were reluctant to adopt a Taiwanese identity based on the anti-DPP narrative. In the latter discourse, the DPP is the prime culprit in the ethnic conflict in Taiwan because it is mobilising the *benshengren* group to exclude the *waishengren*. Further, the party is regarded as a treasonous secessionist by promoting Taiwanese independence and overthrowing the ROC regime. In this narrative, the benevolent is the discriminated *waishengren* and all of the ROC citizenry, while the malignant is the crafty DPP which has committed these seditious acts simply to advance its own political interests. A similar but opposite worldview to that of anti-*waishengren* advocates can thus be observed in this anti-DPP narrative. While anti-*waishengren* advocates generalise themselves to be the benevolent majority in society and *waishengren* to be a minority group controlling most of the Taiwan's resources and oppressing *benshengren*, anti-DPP advocates conceive themselves as the accommodating majority (i.e., ROC citizens) and DPP supporters as a small rebellious group in Taiwan disturbing the society. The tendency of the anti-DPP narrative is to generate its subjects' strong negative emotions toward the villain—that is, the DPP, its members and its supporters—such as aversion, contempt, and resentment.

⁸⁰ Is there an anti-*benshengren* narrative in Taiwanese society, then? Since the concept of the provincial-origin conflict actually implies the struggle between *waishengren* and *benshengren* groups, it seems reasonable to expect an anti-*benshengren* narrative existing in society. However, it is hard to identify an anti-*benshengren* ethnical narrative from my fieldwork. More precisely, there seems to be no narrative in Taiwanese society that portrays *benshengren* as simply malignant, oppressing the good guys. There do exist some *benshengren*, such as Weiting, who possess great hostility towards *waishengren*, but people in Taiwan seem to tend to blame this hostility on the DPP; that is, they believe it is the DPP playing the provincial-origin card and creating divisions in society. Even when they express negative feelings towards *benshengren*, it has more to do with deprecating their taste or social status, and not resentment of them as villains or bullies. This is probably derives from the fact that, for a long time, *benshengren* lacked political power and had low social and cultural status, so they were usually disparaged rather than denounced. In other words, no one wants to bring down the underdog. Not until the political reforms of the late 1980s have *benshengren*, represented by the DPP, really had the chance to seize political power and to challenge its cultural status. This also explains that anti-*benshengren*-like discourses in Taiwanese society usually come along with the anti-DPP (or anti-Chen Shui-bian) narrative: 'there are irrational and radical *benshengren*, but most of them are indeed nice and friendly. It is the DPP and the radical Taiwanese independence advocates who try to provoke anti-*waishengren* sentiments and divide the society'.

As such, the discourse tends to prompt subjects to formulate their worldviews and political attitudes on the basis of this emotional coordinate.

Jane, a case discussed above, is one who embraces this narrative. Her detestation of the DPP is revealed in her understanding of the provincial-origin conflict in Taiwanese society:

Q: Do you think there is provincial-origin conflict in Taiwan?

JANE: Yes, in the past ... there indeed was the provincial-origin problem under Chen Shui-bian's (陳水扁) administration.

Q: If you are asked to explain Taiwan's provincial-origin problem to foreigners, what do you say?

JANE: The provincial-origin problem is the division between the people who came before World War II and those who came after.

Q: And you say it happened when Chen Shui-bian seized administrative power?

JANE: Yes, very seriously.

Q: So, there was no such conflict before that?

JANE: I did not feel it much before. I remember in primary school, the school was promoting Mandarin education. That is, you could not speak Taiyu (臺語; Taiwanese language)⁸¹ at school but had to speak Mandarin on campus. I didn't feel it's bad; I didn't feel excluded at that time. But, when Chen was in power, because I cannot speak Taiyu, I often encountered ... for instance, when I was working, I received phone calls from people who criticised me: 'You cannot speak Taiyu. Are you Taiwanese?' 'You cannot speak Taiyu; how come you work in Taiwan?' That's ridiculous! I had never encountered this situation until Chen was in the power. They shout the slogan 'love Taiwan' and denounce you for not loving Taiwan just because you cannot speak Taiyu. They did that in order to win elections. [...] I feel these politicians manage to divide the people for politics and for their own interests. These divisions make me, who was born in this country and has the citizenship, feel as if I don't belong in this country. Then where should I belong?

It appears that Jane possesses very different perceptions of the provincial-origin conflict in Taiwan to those of some of my other interviewees such as Weiting: Whilst Weiting sees that conflict as one whereby *waishengren* oppress *benshengren* (Taiwanese), Jane thinks it is Taiyu-speaking *benshengren* (Taiwanese) who exclude Mandarin-speaking *waishengren*. This perception comes both from her observation of the political

⁸¹ 'Taiyu' (Taiwanese language) is also known as Hoklo dialect and *Minnan-hua*. It is called 'Taiwanese' because the dialect is spoken by the Hoklo, the largest ethnic group with the greatest population in Taiwanese society. Members of the *waishengren* group, such as Jane, usually talk to each other in Mandarin and thus may not be able to speak Taiyu.

development in Taiwan and from her own experiences of being denounced, excluded, and discriminated against. As presented in the interview transcripts above, she blames these humbling experiences and her inability to fully claim Taiwanese identity on the political manipulation of the DPP (and Chen Shui-bian).

Jane actually would like to identify closely with the idea ‘Taiwanese’; she even feels it’s her obligation to be proud of Taiwanese identity. But unfortunately and shamefully, some politicians in Taiwan (particularly those of the DPP, in Jane’s perspective) manipulate the term and make it ‘political’, which hinders her full embrace of the idea. Her conflicting and ambivalent feelings towards Taiwan/Taiwanese explicitly manifest in the following two passages of her interview:

Q: On what aspect may you not feel proud of Taiwan?

JANE: Not proud of Taiwan? ... I think there is none. You are Taiwanese, and then you should feel proud (of Taiwan). But the only thing is, or the thing we feel incompetent to change, is that we (Taiwanese people) often become chips manipulated by politicians. I feel this is what we feel incompetent about; it does not mean we are not proud ...

Q: Can you clarify your point? Chips manipulated by politicians?

JANE: They want ‘*taidu*’ (臺獨; Taiwan independence)! They try to use (controversial issues) to attain their own political interests. And it turns out to be ... ‘You were born in Taiwan, and then you are Taiwanese. You are Taiwanese, and then you should love Taiwan. If you don’t speak Taiyu, you are not loving Taiwan. If you want to connect with China, you are not loving Taiwan’. I think these are ... manipulations and brainwashing conducted by some political parties and some politicians for their political gain. And they make the term ‘Taiwan’ political. That’s really a shame. It should be good to be an ‘original’ Taiwanese. There should be nothing bad in that.

JANE: If people ask me this question with political intentions, I would hesitate, and I don’t know whether I should say I am Taiwanese or Chinese. That’s because ... although I am Taiwanese, I don’t support ‘*taidu*’. But, if I don’t identify myself as Taiwanese and say I am Chinese, people would think I’m one who was born in China, and I’m a communist.

Asked how she would identify herself when travelling abroad—Chinese or Taiwanese—she selects ‘Chinese’. One of her reasons is, again, the term ‘Taiwanese’ is

too political: To Jane, ‘Taiwanese’ is tightly articulated with the DPP and with *‘taidu’*— that is, secessionism.⁸²

My interview with Luohung also illustrates the connection that can be made between a person’s Chinese/Taiwanese identity and the anti-DPP narrative. As previously mentioned, Luohung identifies himself as both Chinese and Taiwanese. His identity appears to have been forged and shaped by two main factors: his deep emotional attachment to China and his vehement detestation of the DPP. His repugnance for the DPP is so strong that he has had many arguments with colleagues who are DPP supporters:

LUOHUNG: I just hate them ... these fucking pan-green supporters in the office.⁸³ Why the hell do you support the pan-green? They are fucking abominable.

The analysis of his abhorrence to the DPP has to be traced back to the development of his political party affiliation. Long before the DPP established, Luohung joined the KMT party in high school. He says that at that time the drillmaster on campus strongly urged students to join the party, and almost everyone would do so in the expectation of receiving some privileges once they were out in society and working.⁸⁴ He respected authority, and considered the political reformers in the late 1980s, the so-called *dang-wai* (黨外; literally, outside the party) groups,⁸⁵ to be rioters violently disturbing the

⁸² Nevertheless, Jane would still identify herself as Taiwanese because, as she states in the interview, her husband is Taiwanese (*benshengren*), and because she was born and has lived in Taiwan for years.

⁸³ The term ‘pan-green’ refers to the DPP camp because the colour of its party flag/logo is green and white, whilst ‘pan-blue’ refers to the KMT camp because the KMT logo is a white, twelve-point sun on a deep blue background. They are ‘pan’ because the term in each case includes smaller break-away parties, e.g., the Taiwan Independence Party and the Taiwan Solidarity Union in the ‘green’, and the New Party and the Peoples First Party in the ‘blue’.

⁸⁴ Since the KMT party took over the highest administrative power and all public property in Taiwan under U.S. auspices following Japan’s defeat in World War II, and thus possessed vast resources, some people like Luohung, before the political reforms in the late 1980s, might have expected to enjoy some privileges by joining the KMT party.

⁸⁵ Until the ban on organising political parties was lifted in 1987, there was only one legal political party, the KMT. All early anti-KMT activists/groups or candidates who were not affiliated to the KMT in local elections were thus called *‘dangwai’*, meaning they were ‘outside the [KMT] party’.

social order. Since the *dang-wai* were the precursor to the DPP, Luohung had a poor impression of the emerging opposition political party from the very beginning. In addition, Luohung describes himself as having been a '*da-zhongguo-zhuyi-zhe*' (大中國主義者; literally, Great-China-ideology advocator) since he was very young. He believes the version of history he learnt in primary school, advocates that ethical narrative and the nationalist aspirations that the KMT advocates, and is eager to take the mainland back. He tells me he resolutely supported unification in the past. In sum, to Luohung, the KMT represents every value that he holds in high regard, such as the nationalist aspiration for unification and the social stability maintained by authority, while the DPP represents just the opposite: a devious and calculating mob, hungry for power and working for secessionism. As a result, Luohung does not and never will support the DPP or vote for its candidates, although he is conscious that the KMT is corrupt and performs incompetently in many aspects. He jokes: 'Even if the KMT chooses an idiot to run for election, I will still vote for him'. Like Yen, Luohung votes a party (i.e., the KMT in this case) not because he likes or has good images of the party, but because he does not want the party he abhors (i.e., the DPP) to seize political power.

Luohung seems to be in great doubt about the concept of Taiwanese identity. In the interview, he accuses the DPP of manipulating the idea and provoking provincial-origin conflict:

Luohung: In fact, the provincial-origin problem is intentionally provoked in elections. 'Taiwanese vote for Taiwanese'; this sentiment was aroused by Chen Shui-bian!

Q: So, the situation was better before Chen?

LUOHUNG: Yes.

Q: It was because ...

LUOHUNG: He tried to win the election.

Q: You mean, the Taipei mayoral election of late 1994 or the presidential election in 2000?

LUOHUNG: The presidential. He could not say that when running for Taipei mayor. Basically, there are more *waishengren* in Taipei. [...]

Q: When he said ‘Taiwanese vote for Taiwanese’, didn’t you identify yourself as this ‘Taiwanese’?

LUOHUNG: No. I knew they were manipulating the ideology on that term.

To Luohung, the meaning of ‘Taiwanese’ seems to be split in two: one meaning refers regionally to the place where he was born and grew up, and the other is politically redefined by the DPP for political mobilisation and for their interest. He only identifies himself with the former and possesses positive feelings towards it: He thinks: ‘since you live in this place, you feel proud of this place’. When watching sports competitions between Taiwanese and Chinese athletes, Luohung cheers for the Taiwanese. Yet, with regard to the term ‘Taiwanese’, Luohung profoundly disparages and resents the DPP’s intentional manipulation of it, which, he charges, seems to lead to severe conflicts in Taiwanese society.

Conclusion

To depict the important role of feelings in identity formation, this chapter explores their relationships and presents the mechanism of the two discourses of ethical narrative and imagined nostalgia. On the one hand, the core emotion in ethical narrative emerges from its inherent dualist structure of good versus bad, which provokes its audiences’ positive feelings for the good in-group and negative ones for the bad out-group. On the other, the core emotion of imagined nostalgia—namely, the sense of familiarity—is produced by external objects to legitimate the identity that it supports.

The two mechanisms presented in this chapter suggest the complex interaction between emotion and cognition. An ethical narrative, invariably informed by one’s perception of reality (i.e., one’s interpretation of social injustice or inequality), can stir its audiences’ emotions. At the same time, such emotions can reversely reinforce subjects’ beliefs and perceptions of reality, as well as even reshape their interpretation by directing

it toward an extremely simplistic form. Weiting's case is a good example; his anti-*waishengren* discourse is informed by his life experiences, and the resentment provoked in the discourse is so strong that it inclines him to take a more radical position against *waishengren*. Likewise, Jane tends to view current international relations by reference to the East-West antagonistic framework, and Luohung sees politics in Taiwan simply as the conflict between KMT supporters and DPP supporters.

The two mechanisms also manifest the discursive nature of the linkage between emotions and identities. First, as the analysis clearly shows, identity in and of itself does not possess the capacity to arouse its subjects' emotions, but is simply a generic label until articulated with other emotional discourses. Second, feelings and discourses all emerge from solid historical backgrounds or social contexts. Not only are those ethical narratives that are collectively recognised based on certain historic facts (however varied or even distorted the interpretations of these facts may be),⁸⁶ but an individual's nostalgic sentiments likewise come from his/her early life experiences. Third, the feelings and discourses similarly incorporate imagined ideas about the characteristics of a group; subjects can adopt and believe in ethical narratives and imagined nostalgia, and immerse themselves in the emotions that these generate, without personal experience of the events, places, or history concerned. Feelings of identity do not necessarily need to be based on an experience of 'being there', but can nonetheless be authentically generated by these triggers.⁸⁷

These discursive characteristics also disclose a potential space to resist these powerful discursive interpellations and offer the subject the chance to choose whether to respond and conform to a discourse or to reject it. Even when a narrative is widely

⁸⁶ Of course, different narratives can be produced around the same historical event or the same concept. For instance, while Weiting regards the provincial-origin conflict in Taiwan as *waishengren* bullying *benshengren*, Jane understands the concept as Taiyu-speaking *benshengren* excluding *waishengren* (but Jane does not blame *benshengren* for this exclusion but accuses the DPP's vicious political manipulation).

⁸⁷ In other words, when these feelings are generated, they are real feelings; they are patently felt by the subject, although they are induced by stories or mediated by other objects.

recognised and believed in the society, the individual may refuse to embrace it. Ackbar Abbas' concept of 'affective politics of disappointment' seems able to explain this sense of seeking for change.⁸⁸ The concept elucidates the point where politics, passion and love can emerge from the failure of expectations and hopes, that is, from an uncomfortable and uneasy position of the subject. Analysing the works of noted Hong Kong filmmaker Wong Kar-wai, Abbas posits that there exists a perpetual, inevitable gap between individuals' actual experiences and the expectations engendered by social discourses that seek to shape and collectivise personal experience. The perpetual gap signifies that the attempt at collectivisation will never truly succeed, and therefore 'all appointments are dis-appointments'. When suddenly realising this gap (dis-appointment)—that is, when suddenly encountering the unfamiliarity in the familiar discourse, the subject experiences a sense of dissonance and disappointment and seeks to change the discordant situation.

That being said, I do not mean to propose a radical postmodernist social-constructionist view that thinks of feelings as purely socially constructed or only discourse-based. However, consistent with research that takes a culturalist approach, my study of the sentiments underlying the generic categories 'China/Chinese' or 'Taiwan/Taiwanese' indicates that there are pre-existing feelings attached to various cultural products. Such pre-existing feelings could be, for instance, the worship of genealogies of privilege in pre-modern Europe,⁸⁹ Catholic rituals and images of love and motherhood in Italian culture,⁹⁰ or filial culture in Chinese society,⁹¹ whilst feelings of morality and of familiarity are other examples that are thematically deduced from my fieldwork observations. These feelings are generated on the basis of individuals'

⁸⁸ Ackbar Abbas, 'Thinking Through Images: Turkishness and its Discontents: A Commentary'.

⁸⁹ Julia Adams, 'Culture in Rational-Choice Theories of State Formation', in *State/Culture: State Formation After the Cultural Turn*, ed. George Steinmetz.

⁹⁰ Mabel Berezin, 'Political Belonging: Emotion, Nation and Identity in Fascist Italy', *State/Culture: State Formation After the Cultural Turn*, ed. George Steinmetz.

⁹¹ Vanessa Fong, 'Filial Nationalism among Chinese Teenagers with Global Identities', *American Ethnologist* 31, no. 4.

experiences, cultures, practices, lifestyles, and traditions from the past, and they can be further evoked and then harnessed by various emotion- or value-oriented discourses, such as Italian fascism⁹² or Chinese nationalism.⁹³

The differences in opinions about Taiwan's future among interviewees with strong feelings about being Taiwanese also exemplify this point (i.e., the disconnection between feelings and national identities: they have to be linked by emotion- or value-oriented discourses to empower identities). Yuxin prefers to maintain the status quo and opposes unification while Yen also prefers the status quo but could accept unification. For his part, Weiting strongly supports Taiwan independence and rejects unification. If we consider the nationalist aspiration of building a nation/state in which 'the political and the national unit are congruent' as a necessary characteristic of nationalism,⁹⁴ apparently Weiting is the only one amongst the three who may legitimately be considered a nationalist. The point is, the sentiments described in this chapter, whether they are rooted in moral dualism or are derived from a sense of familiarity, cannot be directly equated with the traditional concept of 'nationalist sentiments'.⁹⁵

In sum, my thesis suggests that such emotion- or value-oriented discourses are abundantly endowed with the resources and tools necessary for the subject to build upon them with mental activities. These narratives and discourses attract us by providing the opportunity to take part in dramatic worldviews and stories, and to feel moral and emotional attachments as well as a sense of belonging. The cooperation among these various types of discourse 'gives us the opportunity to feel moral, right, and just';⁹⁶ it makes their participants into emotional subjects as well as discursive subjects.

⁹² See footnote 90.

⁹³ See footnote 91.

⁹⁴ Ernest Gellner, *Nations and Nationalism* (Oxford: Basil Blackwell, 1983).

⁹⁵ It also shows that possessing these nationalist-sentiment-kind feelings for a generic category of people does not render one a nationalist subject (i.e., cause one to embrace nationalist discourses). Other influential factors and discourses are discussed in Chapter 5: 'Political Ideologies'.

⁹⁶ Joshua Searle-White, *The Psychology of Nationalism* (New York: Palgrave, 2001), 88.

Cultural Hierarchies

Introduction

This chapter addresses cultural hierarchy, by which I refer to an evaluative system, shared in society, that endows identified objects and ideas with particular socio-cultural values and images. Like the ethical narratives discussed in the previous chapter (such as anti-*waisbengren*, anti-KMT, and anti-DPP discourses), the function of cultural hierarchy relies on the operation of a dualistic structure: the favourable image and value of one object or idea is generated only through contrast with another. Cultural hierarchy thus always involves at least two groups: one is appreciated, favoured, and thus dominant, while the other is disparaged, disfavoured, and subordinate.¹

French sociologist Pierre Bourdieu has coined quite a few useful concepts to analyse this value-setting system.² First, his idea of ‘symbolic power’ adequately describes how cultural hierarchies can be created and maintained by dominant groups in society.³ This power, according to Bourdieu, is an almost magical power capable of ‘constituting the given through utterance, of making people see and believe, of confirming or transforming the vision of the world and, thereby, action on the world and thus the world itself.’⁴ It is a power creating values, generating symbolic systems that ‘ensure that one class dominates another by bringing their own distinctive power to bear on the

¹ Although the dualistic framework can be considered as the prime characteristic of both cultural hierarchy and ethical narrative, they in fact operate very differently. A member of a society might be fully aware of the socio-cultural value and image that the society gives to a generic idea, without necessarily taking part in a particular form of antagonistic narrative that relates to the generic idea. The cultural hierarchy is not an ethical narrative; it functions by instilling generic ideas with certain socio-cultural values rather than by dictating moral scenarios to its subjects—more specifically, while one operates on socio-cultural values, the other works on moral values.

² See: Pierre Bourdieu, ‘Social Space and Symbolic Power’, *Sociological Theory* 7, no. 1 (1989).

³ Also: Pierre Bourdieu, *Language and Symbolic Power*, edited by John B. Thompson (Cambridge: Harvard University Press, 1991).

⁴ *Ibid.*, 170.

relations of power that underlie them and, thus, by contributing, in Weber's terms, to the "domestication of the dominated".⁵ Bourdieu further points to the close relationship between symbolic power and his concept of 'institution', generally referring to 'any relatively durable set of social relations which endows individuals with power, status and resources of various kinds.'⁶ In his notion, this term is usually designated to social organisations (such as churches), or those established by the modern state (such as the educational system). These institutions possess great capacity to define the effectiveness as well as validity of discourses to the social member; they are usually the agents acting on behalf of the dominant class to exert the symbolic power for the purpose of maintaining its dominant status. The policy of official language is a classic example offered by Bourdieu:

[R]egional and purely oral dialects were relegated to the status of patois, defined negatively and pejoratively by opposition to the official language. [...] [T]he purification of thought through the purification of language, would give the upper classes a de facto monopoly of political power. By promoting the official language to the status of the national language—that is, the official language of the emerging nation-state—the policy of linguistic unification would favor those who already possessed the official language as part of their linguistic competence, while those who knew only a local dialect would become part of a political and linguistic unit in which their traditional competence was subordinate and devalued.⁷

By giving a language an overwhelmingly hegemonic and monopolizing position, the nation state offers those people who primarily use the chosen language a superior and advantaged status in relation to those who do not. Further, because this linguistic unification has significant influence on the national education system and job market, as Bourdieu also points out, people who customarily use other languages are thus perceived as less educationally and socially competent than the speakers of the privileged language.

⁵ Bourdieu, *Language and Symbolic Power*, 167.

⁶ John B. Thompson. Introduction to *Language and Symbolic Power*, by Pierre Bourdieu, (Cambridge: Harvard University Press, 1991), 8.

⁷ *Ibid.*, 6.

Though this chapter acknowledges the explanatory framework of Bourdieu's theory and will illustrate the institutional effect on the formation of the cultural hierarchies in Taiwan in depth (particularly national education and language policies), it argues that placing too much analytical emphasis on institutional factors can lead to several problems. As a theorist largely influenced by Marxism, the Frankfurt School's paradigm, and post-structuralism, Bourdieu shows his great interest in and care about how the dominant group (arguably, the bourgeoisie) controls and exploits the subordinated groups, particularly via means of the superstructure (e.g., culture, art, education, etc.) and institutional power. Not only are many of his theoretical concepts borrowed from economic terms (e.g., market, four forms of capital, etc.), but his conceptualisation of power is also rather Marxist dualistic—i.e., one group (class) dominates the other. While stressing the role of institutions in particular, the concept of symbolic power is an example coined in this idea of power. However, the problem is that research in this vein tends to ignore other non-institutional influence. In fact, as this chapter will illustrate, cultural hierarchy can also be constructed and disseminated in more personal or inter-personal ways. That is, it can be constructed through personal experiences in which the concerned groups are staged, and it can be produced by common people's opinions and narratives disseminating in streets and alleys—even they contradict the discourses promoted by institutional means like national education.

The second problem for this type of research is neglecting individual subjectivity. More precisely, by putting disproportionate emphasis on institutions, the research implies omnipotent influence from institutions and thus its definite success. Research in this vein is incapable of exploring how individuals may resist the institutional power because they lack the proper theoretical tools to do so, making this form of research inadequate for describing the real dynamics between structural discourse, subjects, and identities. Therefore, the third problem is its inability to explain changes of cultural

hierarchies and of individual identities. The assumed omnipotent influence from the institutional power suggests that the cultural hierarchy (set by the institution) is unchallengeable and unchangeable—unless the institution is overthrown or changed. Yet, this framework does not explain how and why an institution changes.

My thesis proposes the theory of value-oriented discourse to explain this question. As will be shown in the following sections, a cultural hierarchy can change when the values of the two groups in the hierarchal relationship change. For instance, in the discourse of economic development (more precisely, the value-oriented discourse that Taiwanese are wealthier, and thus better, than Chinese), a cultural hierarchy gives the citizens of the Republic of China (ROC, Taiwan) a better socio-cultural image than the citizens of the People's Republic of China (PRC, China). This can be challenged as many wealthy Chinese men now have much greater fortune than the average Taiwanese person. The point is, the cultural hierarchy and the socio-cultural values it creates change not because the promoting institution has changed, but rather because the general social perceptions of the concerned groups (perceptions forged and shaped by value-oriented discourses) have changed—Chinese people are no longer conceived of as poor, as they were previously regarded; they are richer now.

This chapter presents three types of cultural hierarchy that directly relate to Chinese and Taiwanese identity in contemporary Taiwan, that is, the ones that associate specific values with Chineseness and Taiwaneseness, according to their different meanings. The first one has to do with the different social perceptions attached to speaking Mandarin versus speaking Taiyu (臺語 Taiwanese language). The second hierarchy is, as mentioned above, the cultural hierarchy seen between the citizens of the ROC and the citizens of the PRC. The third hierarchy is based on the differentiation between Westerners and Easterners, whereby the idea of Westernness is regarded as modern, developed and advanced, while the idea of Easternness, referring to the Chinese

people, is considered to be less modern and less prosperous. The purpose of this chapter is to succinctly and clearly describe the existence and function of these three cultural hierarchies in Taiwanese society, including the historic situation, institutional and non-institutional factors that contributed to their construction and dissemination, and how these hierarchies interact and influence people's identity formations.

The Cultural Hierarchy that Creates the Different Images of Speaking Mandarin (Chinese) and Speaking Taiyu (Taiwanese)

The first cultural hierarchy presented in this chapter is the evaluative system that is produced by the power relations between dominant Mandarin speakers and subordinate Taiyu speakers. Taiyu (Taiwanese language) refers to the mother tongue of the Hoklo group, which has the largest population of any ethnic group in Taiwan. This group is more often known as *Minnan* (閩南; literally, the south of Fujian Province), the main place where most of the ancestors of Taiwanese people came from. Taiyu is thus also called as 'Hoklo' or '*Minnan-yu*' (閩南語), as the fact that it is a dialect that originated in *Minnan*.⁸ Mandarin, on the other side, is often called '*guoyu*' (國語, the national language), because it was chosen as the official language after the ROC was founded.⁹ Three decades later, when the ROC government took over Taiwan in 1945, Mandarin also became the official language for the islanders (also known as *benshengren*; including two ethnic groups: Hoklo [or *Minnan*] and Hakka). Because *benshengren* group had previously

⁸ It can be argued that the Taiwanese language is more ancient than Mandarin and is thus the 'real' Chinese language, because it is believed to be the language spoken by ancient Chinese people who fled from the north to the south when northern nomads invaded in the fourth century. It is true that Taiyu has a much greater variety of sounds, shifting tones, vocabulary, and glottal stops (such as T, K, and P) not found in Mandarin.

⁹ Mandarin is called Mandarin because it was the official language under the Qing Dynasty. In China, it is one of many dialects and is mostly spoken in the northern regions. Like many other dialects, Mandarin is actually a pidgin language and has been influenced by many northern ethnic groups, such as the Mongols and Manchurians.

used their mother tongue like Taiyu,¹⁰ or, during the Japanese occupation, had spoken Japanese, there was a very clear difference in language usage between them and people who came from China after 1945 (also known as *waishengren*).¹¹

The Four Features of the Cultural Hierarchy in Language Usage in Taiwan

Speaking Mandarin is Refined and Speaking Taiyu is Vulgar

The operation of the Mandarin-Taiyu cultural hierarchy in Taiwan can be witnessed in these comments made by my fieldwork participant, Kaiwen:¹²

KAIWEN: My girlfriend is from Changhua. She speaks Taiyu in their family, but she speaks *guoyu* (Mandarin) to me.

Q: Is everyone used to speaking Mandarin on campus?

KAIWEN: Everyone speaks Mandarin, not Taiyu; except in private conversation. If they (classmates) know you are used to speaking Taiyu, they speak Taiyu with you. If they know you are used to speaking Mandarin, they speak Mandarin with you, not Taiyu.

Q: I see.

KAIWEN: My girlfriend speaks Mandarin when visiting Taipei. Even though my family usually speaks Taiyu, she still speaks Mandarin to my family. She probably thinks speaking Taiyu is something shameful.

Q: Really? Is speaking Taiyu shameful in Taipei?

KAIWEN: I think so. When I studied in Taipei, we would not speak Taiyu at school. I could speak Taiyu, but I would not use Taiyu (on campus). They (classmates) would feel strange if you spoke Taiyu. Few people would understand you, and they would think you are vulgar.

¹⁰ More specifically, while *waishengren* tended to use the national language (Mandarin) when communicating with each other, Hoklo spoke Hoklo and Hakka spoke Hakka. Also, different tribes of Taiwanese aboriginals have their own languages.

¹¹ The difference in language usage is unclear now because Taiwanese have since learned Mandarin (by institutional force), especially the younger generation and those in the north of Taiwan, which is the seat of government.

¹² Kaiwen is an interviewee whose case is discussed in Chapter 2. He was born in 1987 in a *benshengren* family and now is a postgraduate student pursuing a master's degree in science. He claims Chinese identity because he thinks the term Chinese refers to people who have yellow skin and black eyes (as he does). He supports Taiwan's unification with China, assuming that people in China should achieve the same living standards with Taiwanese people. As for his party affiliation, Kaiwen supports Kuomintang (KMT; the current ruling party in Taiwan) and dislikes the Democratic Progressive Party (DPP; the largest opposition party); his image of the DPP is that it is good at manipulating the ethnic conflict between *benshengren* and *waishengren* to gain political advantage.

The account explicitly indicates that in Kaiwen's view, speaking *guoyu* (Mandarin) is more socially acceptable, while speaking Taiyu is perceived as vulgar and shameful. A further example can be seen in my conversation with Haoping.¹³ In the interview, we discuss his impressions of these two languages:

Q: Speaking Mandarin feels like ...

HAOPING: More *simen* (斯文; genteel, elegant, or cultured).

Q: And speaking Taiyu is more ...

HAOPING: Vulgar.

Q: Why?

HAOPING: They just give me these feelings. Well, everyone must have the same feelings. Swearing in Mandarin and swearing in Taiyu give different kinds of feelings.

Q: How about daily conversation?

HAOPING: Speaking Mandarin seems more polite; speaking Taiyu seems more vulgar. [...]

Q: Do you prefer speaking Mandarin or Taiyu?

HAOPING: It depends on the context and the friends you are talking to. For example, with parents I speak Taiyu, but with friends I might speak Mandarin.

Q: With all of your friends?

HAOPING: No. To those friends who are more intellectual (better educated), I speak Mandarin.

Haoping not only perceives this value difference clearly between speaking Mandarin and speaking Taiyu in society, but he also applies these images in his daily life by strategically speaking different languages with different people in different contexts.

'Chinese' is a Beautiful Concept; Too Beautiful for us to be Included in It: Associating the Ideas of Chinese and Taiwanese with the Language Hierarchy

¹³ Haoping's case is also presented in Chapter 2. He was born in 1981 in a *benshengren* family in Ilan County and spent most of his life there. He joined the army in the age of 17 and now is a lieutenant. He married a nurse who works in a hospital in Ilan, and now they have a 3-year old daughter. Haoping claims Chinese identity, but says he only does so when watching movies in which the benevolent are Chinese people and the malignant are Westerners. He equates the idea of Chinese with the concept of a supra-ethnic Chinese nationality and believes Taiwanese are included within the category. Yet he prefers to be called Taiwanese rather than Chinese when travelling abroad, because he worries that foreigners might confuse him with people from the PRC. He supports the KMT because the party is running the government now and thus is his employer; he dislikes the DPP because he thinks the party is crafty and keen to pursue political advantage.

Yet, the real influence of the cultural hierarchy in society is not merely on the images of the languages, but on the impression of the people (groups) who are using these languages. This operation thus depends on which generic labels are associated with the concerned languages. For instance, some individuals, like Yen,¹⁴ tend to articulate Mandarin and Taiyu with the ideas of ‘Chinese’ and ‘Taiwanese’ accordingly.¹⁵ Although zealously identifying himself as native Taiwanese and fervently loving his island homeland, Yen confesses that he holds very positive impressions of the terms ‘*Zhongguo*’ (China) and ‘*Zhonggruoren*’ (Chinese). His high regard for the concept ‘China/Chinese’ is revealed in our discussion about the difficulty of defining these terms:

YEN: This term (Chinese) is too broad. [Laugh] ‘*Zhongguo dang zi qiang* (中國當自強; literally, China has to get strong by itself).’ It was a motto in the past. Don’t you think it (the idea ‘China’) is too broad? I don’t know how to classify and define it. How should we define ‘China’? It’s easier to define ‘Taiwan’, which just represents this land we live in. But, you can’t say that China is represented by the mainland.

Q: Can’t we?

YEN: Of course not. How can ‘China’ represent the mainland? I think the term ‘Taiwan’ can represent our side. But China ...

Q: Why is this term (China) too broad?

YEN: It feels ... very ‘high-level’. When someone says, ‘I am Chinese’, it feels like ...

Q: Superior?

YEN: Yes! The term feels particularly superior. Don’t you think the images (of China) described in our textbooks are grand, marvellous, and beautiful? Thus, when you say: ‘I am Chinese’, it feels like you put yourself on a higher level and treat Taiwanese as inferior. [...]

Q: Since this term is so wonderful, would you not think ‘I am Chinese’, too?

¹⁴ Yen (male) is a 34 year-old reporter whose views were also discussed in the previous chapter. Briefly, he was born in Tainan City in 1980 in a fruit trader’s family and has an older sister. He spent all his life in Tainan, studying for a Ph.D. and now running a cram school there. In the interview, Yen identified himself as Taiwanese only and rejected Chinese identity. He considers China the major rival of Taiwan and resents and distrusts the ruling KMT, believing these two governments share common interest that are inimical to the Taiwanese people. He thus would never vote for the KMT. Although the DPP greatly disappointed Yen in its eight-year presidency between 2000 and 2008, Yen still consistently and unhesitatingly supports the DPP because it is the only large opposition party supporting Taiwanese identity. In terms of Taiwan’s future, Yen can actually accept Taiwan’s unification with China, as long as the process is peaceful and mutually beneficial.

¹⁵ The association is potential but not necessary. For instance, both Kaiwen and Haoping seem not to make this association: They don’t refer ‘Chinese’ to Mandarin speakers and ‘Taiwanese’ to Taiyu speakers. Their conceptualisations of the terms ‘Chinese’ and ‘Taiwanese’ have nothing to do with language usage. For more discussions of their definitions of Chinese and Taiwanese, refer to Chapter 2.

YEN: No. I just identify with Taiwan. We in Taiwan and China are two totally different things. [Laugh]
 Taiwan is Taiwan. I have never said that I am Chinese. I never said that. To me, the concept of
 ‘Chinese’ is too beautiful.

Q: Too beautiful to describe yourself?

YEN: Yes, yes! No one can be so superior to say that he/she is Chinese.

To Yen, ‘Chinese’ is a word of beauty, grandeur, and high culture, and it is superior to the idea ‘Taiwanese’. This conceptualised cultural hierarchy of Yen is tightly connected to a hierarchy of the dualism between Mandarin speakers and Taiyu speakers because, in our interview, Yen actually attributes the term ‘Chinese’ to those who speak Mandarin, and the term ‘Taiwanese’ to those who mainly speak Taiyu:

Q: Since you received the KMT’s education in your childhood, would you not have regarded yourself as Chinese at that time?

YEN: No, because I was a rebellious child. [Laugh] When the school pushed the movement for speaking the national language (*shuo-guoyu-yundong*; 說國語運動), I still spoke Taiyu.

Q: Did you do that on purpose?

YEN: We all spoke Taiyu at home. We were very used to it. If you spoke Taiyu at school, you would be punished by their hanging a sign around your neck.

Provincial-origin Conflict: The Third Facet of the Linguistic Hierarchy

In addition to the ideas of ‘Chinese’ and ‘Taiwanese’, Mandarin and Taiyu speakers can be also associated with the ideas of ‘*waishengren*’ and ‘*benshengren*’, the two ethnic groups in Taiwan. Since *waishengren* and *benshengren* cannot be distinguished by physical appearance, this distinction was generally made on the basis of the different languages they spoke: *Waishengren* mainly use Mandarin, while most *benshengren*’s home language is Taiyu.¹⁶ As a result, the cultural hierarchy between Mandarin and Taiyu speakers can easily be

¹⁶ *Waishengren* and *benshengren* do not have significant differences in racial phenotypes, though people of north Chinese ancestry may tend towards some distinguishing features such as taller build, whiter skin, and broad flat faces, probably indicating Mongolian mixture in past centuries. On the other hand, dress, demeanour, and accent may allow differentiation of *waishengren* and *benshengren* in the older generation

associated with Taiwan's provincial-origin classification system.¹⁷ This social fact is relevant in explaining Yen's recollection of the definition of the term 'Taiwanese' in Taiwanese society in the past:

Q: What did the term 'Taiwanese' used to mean before?

YEN: Taiwanese meant *benshengren*.

Q: When people said 'we Taiwanese', it meant *benshengren* only? Did it not include *waishengren*?

YEN: No. The term was defined as *benshengren*. It was different from *waishengren*. *Waishengren* was *waishengren*. [...] We had not heard that during our childhood ... Elders would not say 'we *benshengren*, they *waishengren*'. They just said 'we are Taiwanese, they are *waishengren*.'

My fieldwork on a *benshengren* couple, Kenbo and Keting, also supports this argument. Kenbo was born in Tainan County in 1941, the year Japan attacked Pearl Harbour. He grew up in a farmer's family with six sisters and brothers. He was very smart and such a good student that he passed the very competitive college entrance test and got into National Taiwan University, the best university in Taiwan. After graduation he became a junior high school teacher, and shortly after, he met his wife, Keting, who was a primary school teacher. Kenbo maintained good relations with local farmers and eventually quit his teaching job and worked at the Tainan National Farmer's Association, where he was elected as the regional director-general for two terms. According to Kenbo, in the past this position had been mostly controlled by the KMT. Therefore, when he decided to join the Democratic Progressive Party (DPP) at the time of the last election he contested for the position of director-general, he became the target of several KMT members and lost. After this injustice, Kenbo went to mainland China to try running a small business with friends, it was not very successful, and he was invited to return to Taiwan to work for the Tainan City government when Su Huan-chih (蘇煥智) of the DPP won the mayorship in 2001.

¹⁷ I use the word 'can' to once again emphasise that this cultural hierarchy has the potential to be bound with the provincial-origin discourse, but it is not necessarily so. For instance, participants like Kaiwen and Haoping do not tend to make the connection. In fact, Kaiwen shows scarce knowledge about the provincial-origin classification in Taiwan.

From their life experiences, it is not difficult to deduce that Kenbo and Keting would be enthusiastic and loyal DPP supporters, and that they would unequivocally identify as Taiwanese. Indeed, they express their resentment and abhorrence of the KMT many times in our interview, and their resentment actually extends to the *waishengren* group:¹⁸

KENBO: [...] We detest *waishengren*, and their ruling clique. Since they exclude us, we also exclude them. That's why I exclude *waishengren*, and I do so even now. ... If a *waishengren* wants to be my friend, I will think it over and review his or her past words and deeds. So I don't have any *waishengren* friends now. I still don't want to be their friend.

Kenbo resists befriending *waishengren* because he feels that they exclude him. The exclusion is based on a cultural hierarchy that characterises *waishengren* as superior to *benshengren* and as reluctant to mix with *benshengren*. As Kenbo states in the interview:

KENBO: [...] They (*waishengren*) discriminate against outsiders; they say they are superior Chinese. ... They say they are Chinese and disparage Taiwanese.

His wife, Keting, also expresses similar feelings:

KETING: They (*waishengren*) have a sense of superiority. They say they come from there (China); theirs is a bigger land; Han ethnicity is superior.¹⁹

¹⁸ Thus it can without much effort be deduced that their Chinese/Taiwanese identity is indeed forged and shaped by several discourses analyzed in the previous chapter, such as the anti-KMT discourse and the anti-*waishengren* discourse.

¹⁹ Here Keting misstated that Taiwanese are not Han because, according to the knowledge he acquired in the society, Taiwanese (excluding Taiwan aboriginals) are classified as Han ethnicity. Keting knows this fact; in the interview she described the differences between Japanese cultural and Han culture during the Japanese occupation and designated the later as the culture that Taiwanese people generally practiced. Her misstatement here should therefore be explained as one forms of her rejection to Chinese identity. More precisely, Kenzue misstates that Taiwanese are not Han because to her, the concept Han is closely associated with the idea Chinese, the generic concept with which she firmly refuses to identify herself. Conceptually excluding Taiwanese from Han helps Keting to alleviate her identity confusion. The same distortion of meaning and classification can be found in Dongming's accounts, in which he likewise excludes Taiwanese from the category of Han. Detailed discussion of Dongming's case is presented in the next section.

Kenbo believes that this inequality is closely related to the general attitudes in society towards speaking Mandarin versus speaking Taiyu, and blames these prejudices on the language policy of the previous KMT government, particularly on the ban on speaking Taiyu in schools and other public spaces. He blames the discriminatory language policy for leaving *benshengren* with a lack of confidence and a sense of incompetence and inferiority for reasons that will be discussed in detail in the following section, about institutional factors that contribute to the linguistic hierarchy.

Being Chinese is Prouder than Taiwanese: Perspective from a Waishengren Elder

Dongming is a *waishengren* whose testimony also provides insights into the close connection between the images of languages (Mandarin and Taiyu), ethnic groups (*waishengren* and *benshengren*), and ideas of ‘Chinese’ and ‘Taiwanese’. He typifies the early *waishengren*, particularly military, who fled to Taiwan in 1949 and often came into direct conflict with local *benshengren* as the KMT commandeered Taiwanese resources.

Dongming was born in 1934 in a small village in Dao County (稻縣) in Hunan (湖南) province, China. Owing to both his father’s work and the Sino-Japanese War, Dongming had quite a mobile childhood. At age five he went to Guilin (桂林) in Guangxi (廣西) province with his father who ran a printing business, but he came back to Hunan when the Japanese army reached Guangxi in 1943 and later, after the Japanese surrendered in 1945, returned to Guilin to help his family run a small grocery shop. But the civil war broke out soon after and, persuaded by a friend, Dongming joined the KMT’s army because, as he said: ‘Soldiers seemed to be able to protect themselves. They were cocky and powerful at that time. Some of them were bullying; they did not pay for their meals and purchases. Businessmen like us would allow that to prevent trouble.’ And the reason he chose the KMT’s army was that the communist army was poor and plebeian, and the

KMT seemed to be more powerful than the Chinese Communist Party (CCP). ‘We called them (the CCP’s army) *tubalu*’ (土八路; local hick Eighth Route Army), Dongming explains in the interview. It can be said that Dongming threw in his lot with the wrong side: the KMT failed in the civil war, and his unit was forced to retreat to a small, isolated island of Viet Nam, where thirty thousand refugees built their shelters with their bare hands. Not until 1953 were they evacuated to Taiwan. Dongming continued his military service after arriving in Taiwan and retired in 1986 as a lieutenant colonel. He since then has settled in Taipei, living on his pension.

When asked to describe his own identity, Dongming identifies himself as Chinese only and rejects Taiwanese identity. I ask why he does not consider himself as Taiwanese:

DONGMING: Taiwanese are Chinese, too. My thinking is very simple: Taiwanese are Chinese.

Q: Therefore you don’t have to specifically mention that you are Taiwanese. Is that so?

DONGMING: Yes. Besides, to our *waishengren*, saying that I am Chinese is classier. The position is higher.

Saying that I am Taiwanese ... well, Taiwanese were ruled by the Japanese. [...]

Q: Do you think the meaning of Taiwanese has changed over time?

DONGMING: Well ... it seems that the distinction was clearer in the past; it is unclear at present.

Q: What was the distinction in the past?

DONGMING: In the past, the division between *daluren* (people who came from the mainland) and

Taiwanese was very clear. Now these concepts are not that obvious.

Q: By *daluren* do you mean *waishengren*?

DONGMING: Yes, *waishengren*. [...] It seems now we don’t much care about this distinction. Now we can say those who live in Taiwan are Taiwanese.

Although aware of the current politically correct discourse on Taiwanese identity (i.e., all people who live in Taiwan are Taiwanese), Dongming still rejects Taiwanese identity at the time of the interview. The reason is not only because he thinks Taiwanese identity is redundant for him (since Taiwanese are also Chinese) but also because he believes being Chinese places him higher in the hierarchy than being Taiwanese.²⁰

²⁰ Apart from illustrating the value-setting, their accounts also show how the hierarchy of language usage can be associated with various social discourses, such as the distinction between Chinese and Taiwanese or the discourse of provincial origin. This influence of this hierarchy (and its associations) is

How Has the Cultural Hierarchy in the Dualistic Classification between Mandarin Speakers (Chinese) and Taiyu Speakers (Taiwanese) been Constructed?

Taiwan's National Language Policy before the 1980s

As previously discussed, Bourdieu has shown how national language policy can contribute to the establishment of cultural hierarchy. Indeed, one of the most influential factors in the creation of the different images of speaking Mandarin and speaking Taiyu in Taiwan is the language policy widely promoted by the government prior to the late 1980s. Tsao Feng-fu,²¹ in his analysis of the national language policy of Taiwan, divides its development into two phases:²² The first was the establishment phase (1945–1969); the purpose of the policy during this time was to eradicate the influence of Japanese language in the society, to pave the way for promoting Chinese (Mandarin) as the official

not confined to the classification of generation and ethnicity: Both the *benshengren* and *waishengren* participants in my fieldwork refer to this hierarchy or use it to explain certain social phenomena in Taiwan—not only members of the older generations, like Kenbo and Dongming, but also the younger participants, like Haoping and Kaiwen, have formed evaluative structures associated with language. Yet it seems that members of the younger generations, represented by Kaiwen and Haoping, tend to not articulate this linguistic hierarchy with identity concepts such as Chinese/Taiwanese and *benshengren/waishengren*. This then further suggests these diverse associations between hierarchy and various identities must be the product of differences in the historic situations encountered by these subjects. Having been born in the late 1970s and early 1980s, Kaiwen and Haoping did not witness background to the cultural conflict between *waishengren* (Mandarin speakers) and *benshengren* (Taiyu speakers). During their lives they have only perceived the result of the cultural conflict of ethnicity: they just know that speaking Taiyu is considered inferior to speaking Mandarin.

²¹ Tsao Feng-fu, ‘*Guoyu zhengce de guoqu yu weilai?*’ (‘The Past and the Future of National Language Policy’), Paper presented at the Ethnic and Cultural Development Conference, Taipei, Taiwan, July 2004. The abstract of the paper is available online: <http://www.ihakka.net/html/0729web/doc/國語政策的過去與未來.doc>.

²² There are in total three phases in Tsao’s analysis: the establishment phase (1945-1969), the imposition phase (1970-1986), and the multi-language policy phase (1987-present). In the main text I only address the first two phases in order to focus the discussion on the language policy that gave Mandarin its monopolistic status. Yet it is worthy of noting that after the lifting of martial law in 1987, as Tsao suggests, multi-culturalism gradually prevailed in Taiwanese society, and native language usage in the society increasingly gained respect. Not only have the early discriminatory policies been removed, but also mother tongues used in daily life, such as Taiyu and Hakka, the two main dialects of *benshengren*, appear in public spaces. For instance, announcements on public transportation are made in Mandarin, Taiyu, Hakka, and English. Television with specifically Taiwanese programs (Formosa TV; FTV) was established in 1997, while Hakka Television Station (Hakka TV) was set up in 2003 with government funding, and Taiwan Indigenous Television (ITV) has been on air since 2004, also with government funding. Native language education is another example: the Ministry of Education started to promote native language education in 1996, and set it as an official subject for primary school and high school students in 2001.

language, and to develop the basis for Chinese education. The Taiwan Provincial Committee for Promoting National Language (臺灣省國語推行委員會) was established in 1946 with the goal of encouraging the speaking of Chinese Mandarin in public places. Schools were then asked not only to teach in Mandarin but also to consider Mandarin speaking ability as one criterion when recruiting new teachers.

The second is the imposition phase (1970–1986). Tsao believes that Mandarin gradually prevailed in Taiwanese society through two mechanisms during this period. One was education. National compulsory education was extended to nine years in 1968, which means that children would officially receive systematic Mandarin education for at least for years. The other mechanism was media regulation. From 1962 to 1996,²³ television in Taiwan was controlled by the government (led by the KMT party). Given Taiwan's low per capita income at that time, the arrival of one television in a village was an important occasion. People who were able to have a television were usually wealthy and powerful; children whose parents could not afford one would gather at the homes of these rich families just to watch television. Television was thus a very effective tool to promote national policy and to shape cultural values and social norms, including promoting national language and establishing the legitimacy of its usage. Guan Renjian, a reporter, commentator and media expert, reports that in the April of 1972 the Department of Cultural Affairs in the Ministry of Education asked all the three television stations in Taiwan to reduce Taiwanese-language programs to less than 16% of total programming; in December of the same year the authority prohibited television broadcaster from showing Taiwanese programs more than one hour per day.²⁴

²³ 1962 was the year when the first television station, Taiwan Television Enterprise Ltd. (TTV), was established. 1996 was the year when the first non-state owned station, Formosa TV, was established, which symbolized the end of the government's direct control on the management of television station.

²⁴ Guan Renjian 'Zouguo na wo bu shuo fangyan de huangmiu shidai' ('The Ridiculous Era of 'We Don't Speak Dialects'), in *The Taiwan You Don't Know* (blog), May 5, 2011, <http://mypaper.pchome.com.tw/kuan0416/post/1322128051>.

Almost all the Taiyu-speaking participants in my study who were aware of the cultural hierarchy between *waishengren* and *benshengren* recognised that the past national language policy had disadvantaged them. For instance, when Yen states that students who spoke Taiyu in his primary school would be punished by hanging a humiliating sign around their necks, I ask him about his own experience:

Q: Were you punished?

YEN: Yes. And I was one of the monitors! [Laugh]

Q: Since you were a lookout, why were you hung with the sign?

YEN: If you were hung with the sign, you had to find another guy who violated the rule and give the sign to that person. That is, when you found another guy speaking Taiyu, you said ‘Oh you speak Taiyu; this sign is for you now.’ Everyone did that. They promoted ‘speak the national language’ at that time. Otherwise, everyone was originally speaking Taiyu. Everyone in my family was speaking Taiyu when I was child. Grandfather, grandmother, father and mother, they all spoke Taiyu. Then they promoted ‘speak the national language’, so that everyone started to learn *guoyu*. If you spoke Taiyu at school, you would be hung with the sign.

Q: Do you remember what was on the sign?

YEN: ‘Please speak the national language’, maybe. I don’t really remember. It was such a long time ago. Something like that.

Q: So, they would not write ‘*Zhounngguoren* speak *Zhongguobua*’ (Chinese people speak Chinese language)?

YEN: No. That would be too extreme.

Q: Would it?

YEN: At that time, I think so. Because everybody would identify himself as Taiwanese then.

Another example is Kenbo’s report:

Q: I’ve heard that students were asked to speak *guoyu* at school, or you would be fined.

KENBO: Yes. Fined and made to wear a sign.

Q: What was on the sign?

KENBO: ‘Please speak the national language’. And there was a fine. One jiao (角; 0.1 dollar). We could buy two pens with one jiao at that time.

Kenbobegan seeks to explain how a *benshengren* student might develop a sense of inferiority and lack of confidence due to the strict ban on speaking Taiyu in public spaces, particularly at school:

KENBO: That's our education! [...] Because students could not speak *Beijing-yu*²⁵ (Mandarin) fluently, it generated a sense of inferiority, which influenced their personality development. That's why we Taiwanese are not used to expressing ourselves.

Because of being banned in public, speaking Taiyu is then perceived as something forbidden, shameful, indecent, improper, and even humiliating; on the other hand, speaking Mandarin is regarded as publicly sanctioned, respectable, and well-bred. Making them wear the sign 'Please speak *guoyu*', as Yen reports, is then an act of publicly humiliating those who speak Taiyu. The education authorities devised these crude and harsh techniques of public denunciation and humiliation in order to discourage the use of local language and encourage the use of the official language, and these techniques did much to shape people's attitudes not only towards the languages but also towards the groups using those languages—not only Taiyu but also those who speak it are then regarded as shameful, indecent, and vulgar.

The Disproportionate Social Resources and Opportunities of Waishengren and Benshengren in Taiwan

Images of a language group do not come only from the symbol construction of the state. The social background, economic status, or cultural and symbolic capital possessed by a particular group also influences how the society views that group and thus contributes to structuring the cultural hierarchy within which the group interacts. In Taiwanese society, the different status and background of *waishengren* and *benshengren* ethnic groups generate different social perceptions of Mandarin speakers and Taiyu speakers.

Chang Mau-kuei in his work on the provincial-origin (ethnic) conflict in Taiwan has explored the difference in status between *waishengren* and *benshengren*.²⁶ He posits that

²⁵ Kenbo uses the term '*Beijing-yu*' to refer to Mandarin instead of '*guoyu*' (national language), the term that Taiwanese people commonly use, for specific political reason: Possessing fervent passion of Taiwanese nationalism, Kenbo refuses to acknowledge that Mandarin is his national language.

the conflict between *waishengren* and *benshengren* in Taiwan was not a racial one because their differentiation is not based on racial phenotypes. Rather, the conflict results from what Chang calls ‘disproportional social organizing principles’, by which means the fact that resources and opportunities in the society are unevenly distributed to *waishengren* and *benshengren*. Chang points to three dimensions that marked this disproportionality. The first one is in politics, mainly reflected on the difference of the number in higher governmental positions;²⁷ The second is the disproportionality in economics, reflected on the outnumbered *waishengren* managers in the state owned enterprises,²⁸ they rules that favoured the offspring of the *waishengren* by providing them exclusive channels to government employment and public positions,²⁹ the privileged deposit interest rate of 18% for careers where *waishengren* have larger number,³⁰ and so on. The third dimension is socio-cultural, and Chang takes the KMT’s language and education policies as the

²⁶ Chang Mau-kuei, ‘Shengji wenti yu minzu zhuyi’ (省籍問題與民族主義; Issue of Provincial Origin and Nationalism), *Zuqun guanxi yu guojia rentong* (族群關係與國家認同; *Ethnic Relationship and National Identity*) (Taipei: Yeqiang, 1993), 233–278.

²⁷ Chang notes that *benshengren* had larger numbers than *waishengren* in holding official positions or in being selected as representatives in local governments and elections below the provincial level (county, municipal, etc.). However, the number of *waishengren* was overwhelmingly larger in higher positions and in the central government, where there were only a few token *benshengren* without real power. Besides, even local elections were controlled by the KMT party, which was directed by *waishengren* elites. To win a local election, the candidate had to affiliate with the KMT. Chang believes these conditions gave *benshengren* a sense of being politically exploited (Ibid., 243–248).

²⁸ In addition to monopolising official positions in the public sector, the KMT elites also held the management of numerous state-owned enterprises (Ibid., 249).

²⁹ Because of its institutional duty to care for the million-some Chinese diaspora (*waishengren*) who retreated from the mainland with the party (most of them were brought to Taiwan in the army), there were policies that supported and assisted servicemen and veterans to be transferred to work in the public sectors (Ibid., 250). The policy described by Chang was codified in the regulation of the Examination Yuan’s ‘Qualification Screening for Colonel and Above to Hold Civil Service Post’ (國軍上校以上軍官外職停役轉任公務人員檢覈). According to Chang, between 1968 and 1992, 1,660 military men were transferred to public positions in ‘senior civil service’ (高等公務員) through the test, which is three times more than obtained equivalent level positions through other common qualification schemes (such as the Civil Service Special Examination; 公務人員特種考試). Moreover, there were also rules that favoured the offspring of the *waishengren* by providing them exclusive channels to government employment and public positions. The A-Type (甲等) Civil Service Special Examination (公務人員特種考試) was an example. Because this type of examination was held irregularly and only recruited very small numbers of people, it was criticised as a special channel for the offspring of the dominant class to become public officials. In addition, the previous regulation of the civil service examination also institutionally guaranteed a specific quota for *waishengren*. The quota and the A examination were abolished in 1996. It was also rumoured that those in the dominant class would save job opportunities for people of their kind as social gifts in order to consolidate their networking or to secure their dominant status in Taiwanese society.

³⁰ Military men, civil servants, and teachers who were recruited before 1995 are entitled to the premium interest rate after retirement.

prime example.³¹ Chang highlights the influence of the superior status of the Chinese Mandarin language: He believes that for some Taiwanese people the unequal status between speaking Mandarin and speaking Taiyu reflects a relationship between dominant and subordinate, oppressor and oppressed; the symbolic power of the favoured class defines what is beautiful, what is vulgar, what is mainstream and what is peripheral.

Not surprisingly, the social disproportionality based on the classification of ethnic identity can generate a cultural hierarchy from this ethnic division. One of my fieldwork participants, Weiting, who has also been presented and discussed in the previous chapter to illustrate the operation of the anti-*waishengren* and anti-KMT discourses, is a representative example. He describes the ethnic disproportion that he experienced in his childhood:

WEITING: They (his *waishengren* classmates) all enjoyed their power, and thought of us as low and beggarly.

[...] They ate gourmet food and had a lot of money. We didn't have any money. We had very little spending money. [...] They bought 5 dollar chicken legs and ate very good food, and we could only eat two-dollar food. [...] Why could these rich people spend 5 dollars, 10 dollars on their meals, and we could only eat two-dollar food? I don't know if what I felt was envy at that time. [...] When I grew older, say, in junior or senior high school, I realised that it was because their parents are high officials; they are like nobility. And we are plebes.

To Weiting, *waishengren* are those who are richer and enjoy a better quality of life, and *benshengren* are those who are poorer, for whom decent meals and basic necessities of daily life can be scarce. His account shows that what disturbs and agitates him in the ethnic conflict between *waishengren* and *benshengren* is the unequal social status of the two groups. Another vivid example is when Weiting recalls a classmate from primary school,

³¹ Chang conceives that one of the main socio-cultural goals of the KMT's rule on Taiwan was to educate and to mould the Taiwanese into a particular, defined-by-the-ruler image of Chinese nationality. The means they employed included promoting the 'speak the national language movement', banning or discriminating against the use of local dialects, giving a selective account of Taiwanese history (for example, describing only the suffering the Japanese inflicted on Taiwan and none of the benefits of their administration, or covering up events such as the 228 Incident), and imposing an educational curriculum that focussed solely on Chinese history and geography, disregarding Taiwanese folk arts and traditional techniques (Ibid., 254–257).

whose father was a rich county supervisor.³² Although they were *benshengren*, the classmate enjoyed a very wealthy lifestyle: he was escorted to school by bodyguards every day, and he went to Taipei to attend an exclusive high school, where most of the students were *waishengren*.³³

WEITING: He went to Taipei for high school. Do you know General Yu Hao-zhang (于豪章), the Commander of the Army Command Headquarters? His son studied at that school, too. They are nobles, high officials; they eat beef and drink wine. Compared to them, we are humble, servile citizens. One time I visited my classmate's house in Taipei, and I so envied him. It was a very big mansion!

Q: But his father was not the head of Taipei County...

WEITING: They bought a mansion there! He sent his son to an elite school; they hung around with *waishengren*. I mean, they are indeed Taiwanese (*benshengren*) [...] they refused to study in our county school; they thought our schools were lousy. They were aristocrats; they had bodyguards with them when they went out; they ate well, drank well. I will never forget the time when I went to his home to meet him before we went to see a movie; his mother gave us two hundred bucks. Two hundred bucks in the 1950s equals twenty thousand bucks at the present time! She gave two junior high school students twenty thousand bucks just for a movie and dinner!³⁴

It once again shows that Weiting's conceptualised conflict is not simply one of ethnicity but one of class, in which the dominant class are both *waishengren* and *benshengren* who fawn on and share interests with *waishengren*. The unequal social status then contributes to the formation of the cultural hierarchy that not only tarnishes the social image of *benshengren* but also supports *waishengren* discrimination against *benshengren*, as lucidly presented by Weiting:

³² Weiting said that a county head was very powerful at that time. Weiting's father was a school principal and his mother was a teacher, and the county head could determine where to allocate these education positions. 'You could be transferred to stay in mountains or by the sea according to the county head's preferences,' Weiting stated. Therefore everyone would try to flatter or even bribe the mayor. This position could easily earn huge income under the table.

³³ In the interview Weiting also charged that *waishengren* elites have the privilege to enter into exclusives school and top universities where the common people must pass very competitive tests to get in. The *waishengren* elites he suggested have enjoyed such perks included Hau Lung-pin (Taipei Mayor 2006-2014), Hu Chih-chiang (Taichung Mayor 2001-2014), Ma Ying-jeou (Taiwan President 2008-2016), and Ma's daughter.

³⁴ Even now, a movie ticket typically costs only around 300 NT.

WEITING: *Waishengren* in Zhongxing-xintzung (中興新村)³⁵ marry Taiwanese women, and they instil such ideologies in their next generation. For instance, they speak *guoyu*, and we Taiwanese speak Taiyu, right? They swear at their wives: ‘You fucking bitch, what primitive language are you speaking? I can’t understand a word!’

Weiting’s story shows his perception of the hierarchy between *waishengren* and *benshengren*. He conflates this hierarchy with the unequal relationship between genders,³⁶ revealing, yet again, how this hierarchy is intertwined with language: the *waishengren* husband condemns his *benshengren* wife for speaking a ‘primitive’ language.

This cultural hierarchy of provincial origins is brought up again when Weiting tells how *waishengren* are eager to immigrate to other countries. He observes that *waishengren* abandon Taiwan and move to Hong Kong, the United States, and Canada, because they think they are Chinese and must not die in Taiwan: ‘They can die in Hong Kong, the United States, and Canada, because they are Chinese, because they worship foreign things and pander to foreign powers.’ To Weiting, *waishengren* (Chinese) belittle the Taiwanese and believe that Taiwan is not as good a place as Western countries, and not as good as China. Another interesting example is found in Weiting’s characterisation of *waishengren* gangs and *benshengren* gangs in Taiwan. He says *waishengren* gangsters wear suits and ties. They tend to carry guns, and they don’t talk much. *Benshengren* gangsters go around in sleeveless shirts and flip-flops and chew betel nut. They are not armed with guns, but use their bare hands or, at most, the kind of machetes that are used to cut watermelon. This image of Taiwan’s gangs vividly embodies Weiting’s cultural hierarchy between *waishengren* and *benshengren*.

³⁵ ‘Central Revival New Village’ (Zhongxing-xintzung) is a district in Nantou County where the Taiwan Provincial Government administration facilities were build – though this level of government is just a figment of the supposition that Taiwan is one among several provinces of the Republic of China, and has long served as a sinecure for *waishengren*. So Weiting reasonably concludes that many *waishengren* officials would reside there in government housing; but this impression is probably outdated.

³⁶ For an example: Liu Dingmei, *Taiwan de chamounan: Dingmei de shengming xieleishi* (*A Taiwanese Girl: Dingmei’s Life Course of Tears and Blood*) (Taipei: Liu Peipei, 2008). This is Liu’s biography, telling her story as a Hakka girl marrying to a mainlander military police officer in the early 1960s.

Chinese Nationalist Discourses:

This section utilises two abovementioned subjects, Yen and Dongming, to illustrate how Chinese nationalism and the cultural hierarchy work together in two different approaches—that is, (1) by endowing the idea of China and Chineseness with beautiful imagery by presenting the grand history of China as well as the promising future of the Chinese nation, and (2) by appealing to the old political idea of the Mandate of Heaven, which grants Chinese (and *waishengren*) superior ruling status over non-Chinese, including Taiwanese people (*benshengren*).

(1) The grand nationalist history and the great aspirations for the future of the Chinese nation:

As mentioned in the previous section, Yen thinks of Chineseness as something beautiful, too beautiful for him to belong to, and I further ask him where these images come from:

Q: How did the textbooks describe China?

YEN: ‘A five-thousand-year grand history’, ‘China has to get strong by itself’ (中國當自強; *Zhongguo dang ziqiang*), and so on.

Q: I thought they said Chinese people were very poor and suffering under the Chinese Communist regime. That people were eating grass and bark.

YEN: I did not have those impressions. [Laugh] [...] I felt differently. They said we should ‘Recover the mainland’ not ‘Recover China.’ Have you ever heard ‘Recover China?’ [Laugh] We all said ‘Recover the mainland.’ When we criticised any bad thing happening there, we used ‘mainland.’ We never said life in ‘China’ is bad, but we said the life on ‘the mainland’ is bad.³⁷ ‘China’ is a beautiful word. Anything used to describe China ... for instance, China is a sleeping ...

Q: Lion.

YEN: A sleeping lion, and it will soon awake. We use these words ...

Q: And dragon.

YEN: Yes, yes! The heirs of the dragon. Don’t you think all the words connected to China are very wonderful?

³⁷ Although this section deals with the symbolic hierarchy between Mandarin speakers and Taiyu speakers, Yen’s account also reveals a hierarchy between his concept of ‘Chinese’ and the idea of ‘*daluren*’ (mainlanders), which is discussed in the next section.

Yen stated that his image of the superiority of the concept of 'Chinese' was learnt from textbooks in his childhood. More precisely, the superior images were indeed constructed by the Chinese nationalism promoted by the Kuomintang (KMT) through national education from the late 1940s to the late 1980s. This construction of the supposed beauty of China and Chineseness was mainly carried out in two ways: one was by celebrating the advance of the ancient Chinese civilisation, which is conventionally represented by China's grand history, its technological accomplishments, and its glorious cultural achievements (particularly its literature, philosophy, and political system). The social studies textbook for fifth-grade students (aged between 9 and 11) published before 1990 is a good example. Among its four units: Unit 2 introduces the five thousand-year history of China, suggesting China was one of the cradles of human civilisation; Unit 3 teaches about great Chinese philosophers, including Confucius, Laozi (老子), Zhuangzi (莊子), and others; and Unit 4 covers the past technological achievements of the Chinese people, such as flood prevention techniques, earthquake detection devices, and movable-type printing.

The other means of constructing the ideology of Chinese superiority was through repeated claims of the promising future of a Chinese nation. Traditionally, nationalist ideology tends not only to construct a glorious collective national history but also to project an illustrious future for the nation. The purpose of propaganda about nationalist aspirations is usually to create solidarity and mobilises people to achieve certain nationalist goals, which can be, for instance, fighting against a common enemy or unifying the nation. The Chinese nationalism at work in Yen's generation, with the image of China as a sleeping lion, is a vivid example of this. It suggests that although the Chinese nation is, compared to other nations, infirm (sleeping) at this moment, it shall certainly become a superpower (an awakened lion) in the near future. The scenario

further implies a moral dualism between the benevolent nation— China or the Chinese people, and the malignant forces—competing aggressor nations.³⁸ The nationalist aspiration of this narrative is that China will overcome all obstacles and defeat all the rival nations, because it is in essence a lion, a strong and beautiful creature. By weaving together the grand history and the aspirational future of the Chinese nation, Chinese nationalism helps to forge the beautiful images of the concepts of China and Chinese. It thus contributes to the development of the cultural hierarchies that give these concepts high value over other generic ideas.

(2) The ideology of the orthodox political lineage of the Chinese nation

As discussed in the previous section, Dongming has absorbed the concept of the cultural hierarchy in which *waishengren* is superior to *benshengren*. Yet the criterion he judges to generate the hierarchy is neither the capability of speaking fluently in Mandarin nor having high socio-economic status in society. Rather, his cultural hierarchy is constructed upon a particular political ideology, which, for a long time, Han people have used to classify ethnicities and to construct their own ethnic identity. The following excerpt from the interview with Dongming, in which he expresses his opinion of Lee Teng-hui, the country's first *benshengren* president, who took office in 1988, illustrates this contention well.

DONGMING: I have a poor impression of Lee Teng-hui because he sees Taiwan as '*tianxia*' (天下; the whole earthly world). In fact, Taiwan is only one part of the earthly world; it is only one area. He considers Taiwan the whole world and thinks he dominates Taiwan (and is satisfied with it).

Q: His scope is too narrow?

DONGMING: Not only his scope is too narrow, but also his concept, his vision is too limited. [...]

Q: Do you mean that he has given up the territory of mainland China?

³⁸ For more detailed discussion about the discourse of East-West antagonism, refer to Chapter 3.

DONGMING: Yes. Actually, we *waishengren* have a concept: no matter whether we support the KMT, DPP, or Chinese Communist Party (CCP), we share Chinese culture (*zhonghua wenhua*, 中華文化) and Chinese tradition (*zhonghua chuantong*, 中華傳統). It is inherited from Yao (Emperor Yao), Shun (Emperor Shun), Yu (Yu the Great), Tang (Tang of Shang), Wen (King Wen of Zhou), Wu (King Wu of Zhou), Zhou Gong (Duke of Zhou), and this concept (of shared Chinese culture) persists. Dynasties change because of conflicts of interest, but the whole Chinese tradition, the (cultural) lineage of Wen, Wu and Zhou Gong, stays the same.

Q: Did you learn that when you were a child in Guilin?

DONGMING: Not in Guilin; much earlier in Hunan. We learned that through generations. [...]

Q: And are you saying *benshengren* don't have this concept?

DONGMING: Their concept is more diluted. *Benshengren* have a diluted concept of Chinese culture. For us (*waishengren*), if family elders knew these concepts, naturally we would also know the concepts. [...] Therefore we despise [*benshengren*]; their cultural roots are much shallower [than *waishengren*]. What's worse is those [*benshengren*] who favour Japan and cherish the past Japanese occupation; Taiwan was occupied by Japan for many decades. We *waishengren* despise this kind of *benshengren*. We would not identify with them; they are the most contemptible.

What Dongming means by 'Chinese culture' or 'Chinese tradition' is actually the ideology that there exists a Chinese orthodoxy in political lineage. This lineage is based not on kinship or blood ties, but rather on the concept of 'the heritage of logos' (*daotong*, 道統) or 'the Mandate of Heaven' (*tianming*, 天命), which, very briefly, refers both to the myth that the Emperor's authority is derived from Heaven. Heaven is the ultimate supremacy; the earthly world is thus called '(lands) under Heaven' (*tianxia*, 天下) and the ruler of the world, the Chinese emperor, is 'the son of Heaven' (*tianzi*, 天子). Only those who possess this divine mandate have the legitimate authority to rule the earthly world.

This political ideology of logos heritage must be examined in juxtaposition with the traditional Chinese ethnic view, that is, a discourse that Zheng Da-hua (2007) and Zou Xiao-zhan (2007) call '*hua-yi-zhi-bian*' (華夷之辨, literally the distinction between the highly civilised Chinese and barbarians). Briefly, the conventional ethnic view of the Chinese was not composed of various competing ethnic or political entities as in the traditional Western worldview. Rather, Chinese culture visualises the earthly world

(*tianxia*) as a series of concentric circles. The most civilised, cultured, superior, and powerful group, the Han or '*huaxia*' (華夏) is at the centre, and is surrounded by many inferior ethnic groups defined as barbarians, which are collectively called '*yi*' (夷). This ideology was the reason why Han people call the area they inhabit the 'central plain' (*zhongyuan*; 中原), and their political community the 'central nation' (*Zhongguo*; 中國), and refer to the regions occupied by other ethnic groups as 'outside civilisation' (*huawai zhi di*; 化外之地). In other words, the traditional Chinese ethnic view has a very distinct characteristic of cultural hierarchy: Both the differentiation of ethnicity and the construction of Han identity are framed by a value system in which Han are more civilised and superior to other peripheral barbarians.

The political ideology of logos heritage then serves as a very significant element by which Chinese (Han) people not only define the level of civilisation of each ethnic group, classify ethnic minorities, and construct Han identity, but also support their particular worldview and legitimise their authority to rule the earthly world. More precisely, only the civilised Han are qualified by the Mandate of Heaven to rule, and being a member of Han, one must, at a minimum, understand and follow this ideology of logos heritage (which in turn gives one the qualification to acquire the Mandate of Heaven to rule the Han).

This can be observed in how Dongming uses this ideology to define Taiwanese as inferior.³⁹ In his conceptualisation, *benshengren* do not possess this mandate (are not steeped in the tradition) since, unlike the KMT, they have no aspiration to rule China. More specifically, in Dongming's cultural hierarchy, *benshengren* are despised and deemed as inferior to *waishengren* because they are politically narrow-minded, because they are willing to renounce sovereignty over the mainland and are content to be confined to the

³⁹ In addition, Dongming states that this concept of a divine mandate was learnt at school in China, which once again manifests the influence exerted by national institutions.

small island of Taiwan. To Dongming the most unbearable idea that *benshengren* have is secessionism, to sever Taiwan from China. Failing to recognize the concept of the orthodox political lineage of the Mandate of Heaven, *benshengren* can never be the authentic and legitimate ruler of the Chinese; they are not eligible to be the ruling authority; they are therefore outsiders, the peripheral, and the inferior.⁴⁰ The combined operation of the cultural hierarchy, the ideology of logos heritage, and the aspiration for re-unification of the Chinese nation are so overwhelmingly effective that Dongming can firmly exclude *benshengren* from Chineseness, notwithstanding the fact that, conventionally, *benshengren* are indeed classified as part of the Han ethnicity.⁴¹

How Does the Cultural Hierarchy (along with Other Social Discourses) Influence Party Affiliations, Political Orientation, and Identity?

We have seen the influence of cultural hierarchy on concept-specific values, and how this type of hierarchy may be constructed and disseminated. The next question is: how does the cultural hierarchy affect identity formation? As is true of the other factors described in this thesis, the power of cultural hierarchy is not absolute; its operations vary in different settings. Some may conform to it, and some may reject it. And a cultural hierarchy may reinforce an existing identity or motivate an individual to change identities.

This section, presents further material from three of the above-mentioned interviewees (Dongming, Yen, and Kenbo) and one additional fieldwork subject, Meizhu, to give a

⁴⁰ Dongming's obsession with the orthodox political lineage of rulers and his deprecation and exclusion of Taiwanese (*benshengren*) emerge once again when he accuses some of favouring the past Japanese rule. He says they are the kind of *benshengren* that *waishengren* despise the most. Japanese are the outsiders for sure; they are barbarians who not only aspired at occupying and ruling China but indeed actualised these ambitions and started wars and killed many Chinese people. Dongming, who suffered from the Japanese invasions when he was a child, sees those who are nostalgic for past Japanese rule as allies of Japan. They are even more despicable than the national enemy (the Japanese themselves), because they have betrayed all Chinese people.

⁴¹ This distortion of meaning can also be found in Kenbo's report: Although she knows that she is Taiwanese and also ethnically Han, sometimes she disassociates these two concepts ('Taiwanese' and 'Han') due to her strong rejection of Chinese identity.

clear picture of different patterns of interaction between cultural hierarchy and identity, and to demonstrate the significant influential capacity of cultural hierarchy.

Cultural Hierarchy and Yen's Identity of Resistance:

Yen perceives 'Chinese' as a beautiful term. This image, as discussed previously, has been contrived by the Chinese nationalism promoted by the KMT government during Yen's compulsory education, which was explicitly designed to forge and consolidate his Chinese identity. Yet the Chinese nationalist ideology has failed to achieve its goal: Yen does not regard himself as Chinese; he excludes himself from the category that he characterises as magnificent. The cultural hierarchy that it produced, contrary to its mission, has come to repel Yen.

One of the reasons for the failure of Chinese nationalism in Yen's case is the terminological distinction between Chinese and Taiwanese constructed by the provincial-origin discourse in Yen's early surroundings. That is, Yen had already claimed Taiwanese identity and rejected its counterpart before his early education began inculcating Chinese nationalism in him:

Q: There was a slogan 'Be an upright and proper Chinese' (做個堂堂正正的中國人; *zuoge tangtang zhengzheng de zhongguoren*) on the back cover of the teacher-parent communication booklet.?

YEN: Yes there was. [Laugh] There were two slogans on the back cover. But I tended to ignore them. I just did not care about them.

Q: Would the whole society at that time, as you felt, reject the idea 'Chinese'?

YEN: I did not feel that.

Q: Would you use that term in your daily life?

YEN: No, no. I would not particularly say, 'I am Chinese,' 'being a self-improved Chinese,' etc. I did not have this image. [Laugh]

Q: Would you use the term 'Taiwanese'?

YEN: Taiwanese ... Well, we are all Taiwanese. We said that at that time, 'we Taiwanese ...' that sort of thing. You heard people say that more or less.

[...]

Q: And they would not use 'Chinese' to refer 'waishengren'?

YEN: No. There was no saying this in the past.

Q: So, 'Chinese' was only a word appearing in the textbook?

YEN: Yes, yes. And the textbook was always very fictional. [Laugh]

Yen identifies himself as Taiwanese because to him, the concept only applies to Taiyu speakers, and Yen speaks Taiyu in his family setting. Meanwhile, for Yen, the concept of 'Chinese' is closely associated with Mandarin speakers. (When asked why he did not regard himself as Chinese, he replies that it is because he spoke Taiyu). The official nationalist glorification of China and Chineseness in school and the requirement to learn speak Mandarin at school did not induce him switch his identity. On the contrary, the beauty and the grandeur he learned to associate with China/Chinese only made him feel inferior and pushed him further away from Chinese identity. He rejects Chinese identity because he believes that he is not as good as what the term describes and he does not deserve the title.⁴²

Cultural Hierarchy, Meaning and Dongming's Identity:

Cultural hierarchy plays a significant role in Dongming's momentous life decisions. For example, he decided to join the army because he believed that a soldier was more proud and superior and had more power than common people, and he chose the KMT because compared to the CCP army, the KMT army seemed more haughty, wealthy (that is, better outfitted and equipped), and powerful. In short, Dongming is disposed to give a lot of deference to wealth and social position, and this significantly guides his life choices and influences his responses when he encounters a conventional value system in society.

When it comes to Dongming's Chinese or Taiwanese identity, cultural hierarchy exercises its influence in a more indirect way. As in Yen's case, Dongming's identity

⁴² Some readers may suspect that Yen is just being sardonic, mocking the overblown image of the beauty and greatness of the Chinese nation. However, in the interview context and throughout our interaction, Yen showed no sign of mockery. He quite sincerely expressed his admiration for the ideas of China and Chineseness.

(embracing Chinese identity and rejecting Taiwanese) seems to be adequately explained by his habitual usage of these concepts in Taiwanese society (i.e., Chinese are *waishengren* and Taiwanese are *benshengren*). However, an analysis that arrives at this conclusion fails to consider how he dealt with the historic changes that can, theoretically, exercise great influence on his perceptions and conceptualisation of identities. For instance, when Taiwanese nationalism emerged with the progressive political reforms of the late 1980s, it seemed politically ‘incorrect’ to associate the idea of Taiwanese exclusively with *benshengren* and to reject Taiwanese identity by virtue of this exclusive association.⁴³ Thus, when Dongming is asked why he claims Chinese identity only and not the dual identity (i.e., identifying himself as both Chinese and Taiwanese), he is careful to state that ‘All Taiwanese are Chinese’. Only in his reference to the cultural hierarchy can Dongming really speak the unspeakable: Taiwanese are different from Chinese, Taiwanese are inferior because they refuse future unification with China and even support secessionism, and thus he refuses to be called Taiwanese. The adoption of the discourse of the cultural hierarchy allows Dongming to delineate and rationalise the differentiation between Chinese and Taiwanese to maintain his traditional identity, to sustain his sense of superiority over *benshengren*, and to loudly proclaim his disdain for the Taiwanese.

Cultural Hierarchy, Language and Kenbo’s Identity:

Generally, the formation of Kenbo’s identity can be sufficiently explained by the two major discourses discussed in the previous chapter: the anti-KMT discourse and the anti-*waishengren* discourse. However, his acute stress on speaking Taiyu renders him a very

⁴³ In this trend the KMT’s leaders with *waishengren* background also proclaimed their Taiwanese identity. For example, Chiang Ching-Kuo made this claim late in the term of his administration, and Ma Ying-jeou, the recent president of Taiwan, also used the discourse of ‘new Taiwanese’ in Taipei’s 1998 mayoral election to appeal to a native Taiwanese electorate.

good illustration of the significant impact of cultural hierarchy. In the discussion about how the meanings of Chinese and Taiwanese have changed over time, Kenbo explained:

KENBO: We called mainlanders '*waisbengren*' before. After the government allowed people to visit relatives in the mainland, we called mainlanders '*daluren*' (大陸人). Now we call them '*Zhongguoren*' (Chinese). That's why Ma Ying-jeou has a sense of crisis and appeals to call mainlanders '*daluren*' again: because he supports unification with China; he believes Taiwan is one part of China.⁴⁴ He knows this crisis, which is actually a good thing to me, is that the national identity of Taiwanese people is changing. Of course he would think of that as a crisis.

Q: How about the term 'Taiwanese'? Has it changed?

KENBO: No. The meaning of Taiwanese has not changed; Taiwanese are Taiwanese. Therefore, if you go South to Yunlin, or even Hengchun,⁴⁵ no one speaks *Beijing-yu* (北京語; literally, language of Beijing; here it is referring to Mandarin Chinese). Even intellectuals (in the South) seldom speak *Beijing-yu*,⁴⁶ particularly those who support the opposition party. If someone speaks *Beijing-yu*, I will be disgusted and refuse to speak to him. We are particular; we have that position ...

Q: But how about youngsters? They can't speak Taiyu because of how they were educated ...

KENBO: But if they come to the South, they should change. It is our mother tongue; it is taught to us by our mothers. That's why when they promoted the 'speaking national language movement,' asking everyone to speak *Beijing-yu* in public ... James Soong was the head of the Government Information Office at that time (1979–1984), and I was the director-general of the Farmer's Association. When we were in a meeting, a county supervisor announced that we should use *Beijing-yu* in the meetings from then on, and right away I raised my hand to oppose him. I said, you can promote and speak *guoyu* as you like, but I will always speak Taiyu, because Taiyu is our mother tongue. To destroy a nation, you have to destroy their language first. [...]

Three plain facts in this account point to the importance of language in the formation of Kenbo's identity and political orientation: First, Kenbo adamantly refuses to use the term '*guoyu*' to refer to Mandarin as everyone in the society normally does. This

⁴⁴ The terminology policy is set because the term 'mainland' implies that China is merely the other part of the whole that comprises the land mass and the island, whereas 'China' is the name of a country, while Taiwan is a different nation. News report for example: '*Fanji Ma bu cheng zhongguo; Tsai Ing-wen: ziwu xiansuo zhuquan*' ('Criticising Ma's Refusal to Use 'China'; Tsai Ing-wen: 'Relinquishing Sovereignty'), *Liberty Times*, February 8, 2011, <http://news.ltn.com.tw/news/politics/breakingnews/461036>.

⁴⁵ The usage of Taiyu varies among regions. In Kenbo's perception, people living in the southern region of Taiwan tend more to speak Taiyu.

⁴⁶ The usage of Taiyu also corresponds to educational background. Kenbo believes that those with higher educational attainment tend to speak Mandarin, whilst those who have received less education tend to speak Taiyu in their everyday lives. And this correlation relates to my fourth point: the national language policies, particularly those carried out in schools, have a great influence not only on people's choice of languages to speak, but also on their perceptions of languages, ethnic groups, and also their own identities.

is because the literal meaning of ‘*guoyu*’ is ‘national language,’ and Kenbo denies that Mandarin is the national language of his country. Rather, he calls it ‘*Beijing-yu*’ (the language of Beijing) in an attempt to objectively designate Mandarin without elevating it to national status. Second, Kenbo refuses to talk to those who cannot speak Taiyu, because they are highly likely to be either *waishengren* or supporters of the KMT party, which Kenbo intensely resents. He has had vehement arguments with such people before, and now he would just prefer not to talk with KMT partisans and ‘dubious’ Mandarin speakers. Third, Kenbo considers speaking Taiyu to be one of the most important characteristics of being Taiwanese. He feels that Taiwanese should speak Taiyu, and those who cannot speak Taiyu are, in his view, scarcely Taiwanese. His great emphasis on speaking Taiyu is in fact a backlash against the mainstream cultural hierarchy created by the previous KMT administration—speaking Taiyu has been depicted as shameful and vulgar in the past; therefore, ‘daring’ to speak Taiyu despite this stigma demonstrates bravery and also shows the pride, passion, and sincerity with which a person embraces Taiwanese identity. From this point of view, speaking Taiyu becomes an important nationalist criterion.⁴⁷ The cultural hierarchy in which he suffered discrimination in the past is now, in turn, shaping his conceptualisation of Taiwaneseeness and strengthening his proudness of claiming Taiwanese identity.

Cultural Hierarchy and Meizhu’s Identity of Conformity:

⁴⁷ Kenbo’s high esteem of Taiyu is shown once again by a casual dinner party with his good friends after our interview. After drinking several bottles of beer, a friend complained to Kenbo that he felt reluctant to vote for a DPP candidate because the candidate did not speak Taiyu but, rather, Mandarin, at his campaign rallies. ‘Taiwanese should speak Taiyu,’ the friend said. Kenbo did not disagree, and expressed his understanding. At the same time, however, he humbly requested the friend to support the candidate. ‘We don’t have any choice,’ said Kenbo. ‘He’s still better than the KMT candidate.’ This incident clearly shows how speaking Taiyu is important to Kenbo and his friend; it is a crucial criterion for their identity and political support.

Thus far, I have discussed the influence of cultural hierarchy in terms of its ability to reinforce identities that correspond to generic ideas that are assigned in the society (that is, *benshengren*'s Taiwanese identity and *waishengren*'s Chinese identity). Here I contrast a *benshengren* subject, Meizhu, who was drawn to the opposite (Chinese) identity due to the operation of the cultural hierarchy. Based on this case, I argue that provincial-origin identity does not have a determinative impact on the choice of Chinese/Taiwanese identity.

Meizhu identifies herself as both Chinese and Taiwanese. It seems difficult for her to explain her identity because people with a background like hers, that is, elderly *benshengren* in the southern region of Taiwan who lived under Japanese rule and received Japanese primary education, tend to be reluctant to accept Chinese identity. In fact, Meizhu retains a positive impression of the pre-1946 Japanese administration, and uses the term 'Taiwanese' to designate *benshengren* exclusively, not including *waishengren*. Yet she claims Chinese identity, and she has kept on supporting the related discourses. More precisely, Meizhu expresses in her interview neither the resentment of the KMT regime and *waishengren* group that Kenbo and Weiting feel, nor the hostility towards the PRC that Yen professes.⁴⁸ I argue that the operation of the cultural hierarchy is the reason these anti-KMT, anti-*waishengren*, and anti-China discourses are not operating in Meizhu's case (that is, the reason Meizhu has not come to reject Chinese identity and support the DPP).

One obvious tendency of Meizhu that can be observed in her interview is her particular preference for and stress on 'individual culture', i.e., education, erudition, civility, politeness, taste, tidiness, orderliness, law-abidance, and so on. The discussion of

⁴⁸ My discussion of these anti-KMT, anti-*waishengren*, and anti-China discourses is mainly presented in Chapter 3, whose main theme focuses on narratives of moral dualism, i.e., discourses that influence people's identity by arousing their moral feelings.

the relative merits of the Japanese and KMT administrations reveals this characteristic of hers:

Q: Do you think the KMT or the Japanese government is better?

MEIZHU: The KMT looked disorganised when they came to Taiwan. After the eight-years' war, everything seemed in disarray. Therefore, when Japan was defeated and China came to Taiwan, when we Taiwanese saw the Chinese army, we thought 'How could these soldiers look like this?' And we felt disappointed.

Q: Disappointed with what?

MEIZHU: The army was totally disorganised; they were much worse than the Japanese army. They gave us a very poor impression. We expected them to be very tidy, orderly and organised. But to the contrary, they camped along the roadside and threw their luggage everywhere. When we were ruled by the Japanese, we had seen how tidy and dignified the Japanese army was, whilst these Chinese soldiers were scruffy and rumpled.

Meizhu gave the Japanese army much higher marks than the Chinese army,⁴⁹ and she made her evaluation based on such criteria as orderliness and tidiness. There is clearly a cultural hierarchy functioning here; to Meizhu Japanese army is given higher cultural values and has better images than Chinese troops.

A similar logic of cultural hierarchy appears once again in her comparison between the KMT and the DPP:

Q: Do you prefer the KMT or the DPP?

MEIZHU: In my opinion, the KMT seems better. Whom will you vote for in this presidential election?

Q: I've not decided yet. Whom will you vote for?

MEIZHU: I always vote for the KMT. I'm not like those who don't know whom to vote for. That's not good. Those who vote for the DPP are useless. Have they not watched what has been reported on television? That woman is just as corrupt as Chen Shiu-bian. Wait and see. [...] The KMT is more honest; the DPP is good at running campaigns and good at blaming others. Would you please vote for the KMT? [...]

Q: Since when have you supported the KMT?

⁴⁹ Giving Japanese administration high praise does not mean that Meizhu would have identified herself as Japanese during Japan's occupation of Taiwan. In fact, she did not do so because she acutely felt the difference between Japanese and Taiwanese at that time: she in fact would regard herself more as Chinese than Japanese because Chinese are much similar to Taiwanese. Her admiration of Japanese administration is given here as one of the examples of how these images of rulers as ordered, organized, tidy, and clean affect her evaluation of political entities.

MEIZHU: A very long time ago. I look down on the DPP; their spokesmen and representatives are unscrupulous. Our family has always supported the KMT. We have not changed.

Q: You think the KMT is good.

MEIZHU: The KMT is pretty good. Look at those KMT members, sitting there politely and in a well-mannered fashion. They are not like those in the DPP who talk nonsense and are babbling all the time. You would know if you watched television.

Once again, Meizhu prefers and supports the KMT over the DPP because she perceives people in the KMT as better mannered than those in the DPP, and this characteristic indicates to her that KMT has more ability to maintain order and control.

Meizhu's account also shows that her evaluation of the two parties is not based on actual administrative performances or achievements, but on the perceived personal behaviour and qualities of the party members—she favours the KMT because its members know how to sit properly and act politely. With this fundamental image, Meizhu will always be willing to give more credence to the KMT and, as a result, to welcome its discourses (e.g., Chinese identity and unification with China).

Meizhu's concepts of the cultural hierarchy have a firm historical support. The political reforms in the 1980s were spurred by various movements protesting against the KMT's ruling, in which the main organisers were the predecessors of the present main opposition party, the DPP. These movements, as portrayed in the government media, were carried out in a rather aggressive way with a series of protests, sit-in demonstrations, strikes, and so forth; their image is contrasted with images of orderly KMT political elites. Even after the establishment of the DPP in 1986, some of its representatives in the Legislative Yuan still staged very eye-catching gestures to bring specific issues into the spotlight, such as turning over tables, occupying the dais, and so forth. (Before 1993, the Legislative Yuan was still mostly composed of the 1947 representatives from China, and they functioned as a rubber stamp congress for the KMT.) These opposition political

activists were branded as insurrectionists and agitators, and so they were distasteful to conservative citizens like Meizhu.

Yet, why are order and tidiness so important to Meizhu when the political realm is considered? I argue it is because these concepts represent power: only power can generate order and cleanliness. In other words, to Meizhu, the Japanese appeared more powerful, more capable, and more competent than the KMT, and the KMT is more powerful and capable than the DPP. Her leaning towards Japan and the KMT is hence due to her admiration for power. What functions is not only a hierarchy of culture, but also a hierarchy of power.

It also suggests that the identity politics of Meizhu's ethnicity is not persuasive. She is not mobilised by the anti-*waishengren* discourse: in other words, she does not really recognise the subordinate condition of *benshengren* in Taiwan; or she does, but she does not see it as an issue that concerns her. One of the main factors in the failure of the *benshengren* identity politics on Meizhu is the operation of the cultural hierarchy: She respects and trusts the familiar authorities (composed of *waishengren* elites), and she regards the reformists (led by *benshengren* elites) as disrupters of the social order. This cultural image of *waishengren* as capable rulers and *benshengren* as aggressive agitators thus forges and shapes not only Meizhu's party affiliation but also her identity.

The Cultural Hierarchy that Creates the Differential Images of Chinese (PRC) and Taiwanese (ROC) Citizens

The second cultural hierarchy presented in this chapter is also an evaluative system that assigns specific values to the concepts 'Chinese' and 'Taiwanese'. However, unlike in the

previous discussion, here ‘Chinese’ refers strictly to the PRC citizens (hereafter, PRCs), while the term ‘Taiwanese’ refers to ROC citizens (hereafter, ROCs).⁵⁰

Chinese (PRCs): Backward; Uncivilised; Unfit Citizens of the Modern World

Several interviews with my participants implicate the role of the cultural hierarchy in differentiating PRCs and ROCs. For instance, Yuxin,⁵¹ who staunchly identifies herself as Taiwanese and adamantly rejects Chinese identity, states that she does not want to have anything to do with Chinese people. She says that Chinese are very different from Taiwanese, and has a very poor image of people from mainland China: She thinks the Chinese are less modern and less cultured, and have a lower standard of living than the Taiwanese. Shuhui,⁵² who also identifies herself as Taiwanese only, also feels acutely the difference between Chinese and Taiwanese. As a hairstylist, she has observed that the Chinese are less fashionable than the Taiwanese. She also thinks that Chinese work less

⁵⁰ These abbreviations are adopted from one of my interview informants who is Singaporean and ethnic Chinese. He said that in his surroundings in Singapore, people use the term ‘PRCs’ instead of ‘Chinese’ to refer the PRC citizens. This terminological division allows Singaporeans of Chinese ethnicity to claim Chinese identity and still differentiate themselves from the PRC citizens. The reason for making the differentiation, according to the informant, is closely connected to the cultural hierarchy in Singaporean society: people from the PRC are deemed as less cultured, so that Chinese Singaporean would not like to be regarded as one of them. Although in Taiwan people do not use these terms PRCs and ROCs (partly because people mainly use Mandarin and Taiyu rather than English), I apply them in this section in the belief that these concepts indeed adequately present the core characteristics of the concerned cultural hierarchy.

⁵¹ Yuxin (female) was born in 1992 in Taipei City. Her father is *waishengren* and mother is *benshengren*. Yuxin spent most of her life in the city and is now an undergraduate student. She regards herself as Taiwanese only and rejects Chinese identity. She limits the concept ‘China’ strictly to the PRC, and she considers the country the main enemy of Taiwan. She thinks China consistently bullies and oppresses Taiwan. She supports Taiwan independence and opposes unification with China. Yet, she supports the KMT. She views the DPP as the troublemaker in Taiwanese society and that it manipulates ethnic issues for its own political interest.

⁵² Shuhui (female) was born in 1985 in Pingtung County, the agricultural southernmost county in Taiwan. She had an unfortunate family life in which her father committed violent acts against her mother. She therefore moved many times in her childhood and received rather poor education. She went to a vocational school to learn hairdressing and now is a hairstylist in Taipei. Without regular education and without interest in political news, Shuhui seems free from the influence of both Chinese nationalism and Taiwanese nationalism. She regards ‘Chinese’ as people from the PRC only. Her perceptions of the concept ‘Chinese’ comes directly from her past experiences of contact with PRCs (she has been to China several times). She has no party affiliation and has no preference for Taiwan’s future. She does not really care about these issues; her life is mainly (if not only) occupied by her hairstyling business, her boyfriend, and Christian religion.

efficiently and are calculating and crafty, while Taiwanese are more well-meaning and generous.

Some of the participants in my study who identify themselves as Chinese also possess these images of Chinese people from mainland China as backward and having a low standard of living. Liwen,⁵³ for instance, confesses that, although she has been to China four or five times, she felt distant each time. She feels that ‘they’ (the Chinese) and ‘we’ (the Taiwanese) are totally different kinds of people: the way we think, talk and act are all different. She says in the interview, ‘They are not ‘normal’ people; they are different from us. I don’t know how to get along with them.’ She sketches a more definite image when she explains why she opposes unification with China:

LIWEN: I don’t think it is necessary (for China and Taiwan) to be together; it will only lead Taiwan into Hong Kong’s situation. [...] Hong Kong is quite Westernised, but China has brought a lot of problems there. For example ... I heard from my Hong Kong friends ... Chinese are disorderly and have too many people. Hong Kong is crowded enough ... What is really scary is the number of Chinese people. They have huge numbers of people! Taiwan is indeed a small place. It would be terrible if Chinese people flocked to Taiwan.

But some of her friends do support future unification. Liwen explains that it might be because they see a good side of China and Chinese people; but she sees only backwardness, poverty, and many knotty social problems.

Another example is that of Luohung.⁵⁴ He confesses that he was a fervent Chinese nationalist and used to staunchly support future unification with China.

⁵³ Liwen (female) was born in 1989 in a *waishengren* family in Taipei. She has strong feelings for China because her grandfather, the family member closest to her, came from China. She therefore would consider herself as both Chinese and Taiwanese, but she indeed hesitates at both identities: She is not sure about Chinese identity because she dislikes people from the PRC, and she is uncertain about Taiwanese identity because she believes the concept is manipulated by the DPP for its political gain. Her poor impressions towards people from the PRC lead her to resist Taiwan’s unification with China. See Chapter 3 for more detailed discussion.

⁵⁴ Luohung (male) was born in 1950 in a Hakka family (classified as *benshengren*) in Pingtung County. He spent his childhood in Pingtung and Kaohsiung and went to Taipei to study at a university. He obtained qualification to teach in high schools and has taught since then in private high schools and educational institutions. Luohung, as he said in the interview, believes unswervingly in Great China ideology and holds ardent feelings for China. He loathes the DPP, its supporters, and all forms of

However, after visiting China many times, and having contact with people there, he felt disappointed and changed his view to a moderate one (maintaining the status quo). More precisely, in his visit he saw how poor China was, and he felt that people in China tended to be less well-mannered and orderly due to the general backwardness there. And these differences between people in China and those in Taiwan make him hesitant about unification. Chenli shares the same view.⁵⁵ He wishes that Taiwan and China could be ‘reunified’ in the distant future, but he does not want this to occur anytime soon:

CHENLI: We cannot accept unification now. No. Look, our people still make fun of *daluren* (PRCs); we despise them. We Taiwanese look down on *daluren*. When the day comes that we do not despise them, we can talk about unification.

He says in the interview that the PRC people generally do not have ‘a social conscience’ (*gongdexin* 公德心); for instance, they don’t queue when waiting, and arbitrarily cut in line. ‘Their cultural standards (level of civilised behaviour) have not improved along with their material (economic) development,’ Chenli says.

Two Indices of Modernity:

Economic Development and Personal Behaviour (Societal Civilization)

A common theme revealed by all participants in their interviews was a disdain for the lack of modernity of the PRC—that is, all were convinced that the Chinese are less

discourse promoted by the party. He was a strong advocate of unification before, but after visiting China and contacting the people there several times, he has changed his mind and now supports for maintaining the *status quo*. See also Chapter 3.

⁵⁵ Chenli (male) was born in 1954 in Kaohsiung as the fourth child in a *waishengren* family. He has been working at a power station there since graduating from high school. He is married to a *benshengren* wife and has two children, who both have graduated from high-ranking universities in Taiwan. Chenli regards himself as both Chinese and Taiwanese, but he actually hesitates about both identities. He identified himself as Chinese when he was a boy; now the idea is becoming more and more remote to him, not only because he thinks the term should refer to the people of the PRC, but also because he thinks he should identify himself as Taiwanese since he has lived in Taiwan for his whole life. Nonetheless, the idea is off-putting to him because the term was used to refer to *benshengren* only when he was a child, and he feels excluded by some radical Taiwanese nationalists, who refuse to recognize *waishengren* as true Taiwanese. See discussions in Chapter 1 and 5.

modern than the Taiwanese. Their judgments are based on two factors. The first is the PRC's lesser degree of economic development. They repeatedly used such words as backwardness and poverty when describing the PRC, which suggests that economic attainment is a major factor when they compare themselves with the PRCs. The second important criterion for measuring a society's modernity is its members' exercise of self-restraint and their observance of social norms of politeness. Various aspects of personal behaviour in public spaces that mentioned in those participants' interviews, such as whether people queue, whether they litter, and how loudly they speak, are understood not only as indicators of how orderly and civilized a society is, and of how convenient and comfortable it is to live in that society, but also as the index for these participants to judge which one group of people is superior than another.

The ideology of prizing modernity can be traced back to the late nineteenth century, a time when many East Asian nations, including China, were forced to deal with a stark situation of invasion, exploitation, and colonisation by Western imperialists. Western modernity was deemed not only as the main weapon for fighting imperialism and colonialism, but also as the cure for these nations' weakness and inferiority, the path to a promising and wealthy life. Once the first task seemed to be accomplished, after World War II, the main purpose of modernising was then to achieve a prosperous future. Economic growth plays a crucial role because it is the foundation of the project, paving the way for infrastructure construction, technological development, satisfying people's basic needs, promoting their welfare, and so forth. In China, the 'Four Modernisations' (四個現代化) project launched by Zhou Enlai (周恩來) in 1963 is a prime example. Two of the four goals, agricultural and industrial modernisation, were promoted in order to directly improve and reform China's economic structure. Taiwan's Ten Major Construction Projects (十大建設) during the 1970s likewise aimed to upgrade industry and develop the country.

The pursuit of modernity always requires disciplined individuals to carry it forward. This is the operation of nationalist ideology—the ethics that demand its subjects altogether not only to fight for the nation’s future and against the national enemy, but also to take the responsibility for the image of the nation. Public domains and private domains merge, and individuality and collectivity are conceptually linked. Public space assumes a greater importance in this modern view because it is the field in which individuals interact with the imagined collectivity of their fellows. More precisely, once the conceptual self and the collective are linked, behaviour in the public space then represents how individuals define themselves as well as the imagined collective. Behaviour in public is thus highly valued and scrutinised; self-control in the public space is on the one hand something that is required of the modern subject and, on the other, an index of the society’s modernity. Moreover, the increased demand for individual discipline results also from the principle of egalitarianism, which is closely related to the goal of increasing society’s wealth as a whole (improving the common people’s living standards). The aspiration is only conceivable and desirable if it is clearly stated that everyone has the same opportunity to benefit from the prospect of modernity. Theoretically, everyone in a nation should have the same opportunity to pursue a happy and prosperous life. This egalitarian principle further leads to the obligation of respecting the public space: as ideally no one is higher or more powerful than the next person, and no one has the right to arbitrarily disturb others.

Taiwan (the ROC): The Authentic China

Apart from these two indexes of modernity, another way to value, classify, and differentiate the ROCs and PRCs is by the operation of the ROC’s version of Chinese nationalism. More specifically, it is the operation of the myth of orthodox Chinese

political lineage which, on the one hand, elevates the KMT regime as heir to the Mandate of Heaven, and, on the other hand, vilifies the CCP as the rebel usurper who occupied the country by deception. The ROC can claim this privileged position because it was the regime that overthrew the foreign-ruled Qing Dynasty in 1911, it was the first regime that united and governed the whole of China after the Qing, and it still survives though on a small island outside of the continent. The CPP never achieved these accomplishments; it never truly united the Chinese nation (since it insists Taiwan as its lost territory), and its victory was a communist ploy of the Soviet Union. This discourse then deems the CCP unorthodox and inferior, whilst the KMT is superior, particularly in its faithfulness to traditional Chinese culture. And, once again, under the operation of the traditional Chinese political/cultural discourse which associates the politically peripheral with the culturally backward, the CCP and the people it rules are also culturally inferior to the KMT and its people.

Two historical facts further support this hierarchic discourse and devalue the CPP's cultural capital. The first is the CCP's simplification of traditional complex Chinese characters. With their thousands of years of history, the characters can be seen as a symbol of Chinese traditional culture. China's abandoning them can thus be regarded as grave disrespect of Chinese tradition, whereas Taiwan's continued use of the complex characters renders it the faithful guardian of Chinese culture. A note from Ma Ying-jeou (the ROC president),⁵⁶ published on the web site of the Office of the President explicitly reflects this view. First, he uses the term 'orthodox characters' instead of 'complex characters', suggesting that the latter is a negative appellation. More clearly, the word 'orthodox' clearly suggests 'standard,' 'true to tradition', and 'the real thing', as opposed to written forms that are 'variant', 'popular versions', or 'simplified'. Second, Ma

⁵⁶ President's Essays, 'The Cultural Significance of 'Writing in Simplified Chinese Characters While Maintaining a Reading Knowledge of Orthodox Forms' in mainland China,' *The Official Website of the Office of the President Republic of China*, June 23, 2009, <http://english.president.gov.tw/Default.aspx?tabid=1136&itemid=20800>

represents that Taiwan has the main population using the orthodox characters and thus has the responsibility to promote their use. In the note, he describes the characters as ‘an integral part of the effort to preserve Chinese culture’, and proclaims ‘Taiwan plays a decisive role in maintaining the use of orthodox characters. We simply must not sell ourselves short on this point, or neglect the tremendous responsibility we bear to preserve Chinese culture.’ He also suggests: ‘If we can encourage more people from mainland China to learn to recognise and use orthodox characters, it will deepen their familiarity with Chinese culture and strengthen mutual understanding across the Taiwan Strait, especially given the growing strength of cross-strait ties today.’ In this discourse, Taiwan is more authentic than China: Taiwan preserves the best and most orthodox Chinese culture, and it has the ability and also the responsibility to ‘deepen’ mainland China’s familiarity with that culture.

The second historical fact is that the CCP’s Great Proletarian Cultural Revolution (1966–1976) had as one of its goals the eradication from the society of traditional and cultural elements, in particular the Confucian idea of hierarchical social harmony. When the Cultural Revolution broke out, the KMT government in Taiwan not only propagandised its excesses and denounced the brutality and inhumanity of the CPP regime, but it also started the Chinese Culture Renaissance Movement (*zhonghua wenhua fuxing yundong*; 中華文化復興運動) in November 1966 in the attempt to compare itself with the CPP and to claim its authenticity in the orthodox Chinese tradition. The contrast between China’s lost Chinese culture because of the Cultural Revolution and Taiwan’s well-preserved Chinese culture is also uttered even now. An article published in 2010 in *Washington Life Magazine*, entitled ‘Yes Taiwan!’ uses this discourse to promote Taiwan, when its author gushes, ‘Unlike the PRC, which continues to redefine itself following the Cultural Revolution, traditional Chinese arts and customs have survived in Taiwan uninterrupted.’ Other evidence can be found in President Ma Ying-jeou’s public

speeches. Many times he has pronounced that in his administration the ROC aims to be the pioneer of Chinese culture. This aspiration and confidence are indeed based on the Ma administration's belief that Taiwan possesses abundant Chinese cultural capital.

Institutional Construction: Taiwan's Primary School Textbook Before 1990

The ROC government (particularly the two Chiang administrations) has systematically emphasised the poor conditions in the PRC since 1949, which is made explicitly clear in the previous version of the primary school textbook. National dissemination of the message of the PRC's backwardness serves two ideologies: The first one, as previously discussed, is the orthodox political lineage of the historical Chinese nation, which confers the Mandate of Heaven on the KMT and denigrates the PRC as the rebel counterfeit regime that usurped mainland China. The second one is the Cold War ideology, which was based on the dualistic classification between the liberal alliance led by the United States and the Communist Internationale led by the Soviet Union. As a satellite in the liberal alignment, the ROC government was inclined to generate propaganda that portrayed liberal capitalism as progressive, civilised, and advantageous for economic development, while denouncing the backwardness and economic catastrophes caused by the international communist league. Specifically, the KMT regime described itself as a capable administration that had led Taiwan to a developing, Westernising modern future, extolling its contribution not only to major infrastructure construction on the island (new highways, ports, heavy industry, etc.) but also to Taiwan's outstanding economic performance. Together, these two discourses (the ROC's Chinese nationalism and the Cold War ideology) required and promoted the same scenario: Taiwan is a modern, civilised, rapidly developing region where people are wealthy and live happily, while China is a backward, underdeveloped place where people suffer in poverty.

The content of the eighth volume of the social studies textbook before 1990, entitled ‘Reviving and Building up the Nation’ (*fuguo yu jianguo*; 復國與建國), offers a good example of the state’s propaganda. Its first three units (out of four), are sequentially titled ‘Great Government’, ‘Peaceful and Flourishing Society’, and ‘Healthy and Happy Living’, praising the modern construction, political and economic reforms, high standard of living, widespread education, and so forth, that have been attained under the leadership of the (KMT) government. The last unit, ‘Accomplishments of the National Revival Plan’ (*fuguo daye de wancheng* 復國大業的完成), devotes many pages to making the case that mainland China represents the opposite, inferior case. The text proclaims: ‘We are free, wealthy, and healthy living in the Taiwan region; joy is in our hearts, and smiles on our faces. However, the mainland comrades are suffering under the threat of poverty, hunger, cold, terror and death. One China, two different worlds. We have to ask: Why?’

The next section presents a fictional married couple, Gu Ximing (顧西銘), an American engineer who had been to China and is now visiting Taiwan, and his American wife, Lu Yishi (路憶詩). The textbook shows them making comparisons between living in Taiwan and in China. Gu says, ‘Everywhere in Taiwan, everyone is free. There is no fear in their hearts; smiles are on their faces. [...] But it is totally different on the mainland. Chinese people on the mainland have stupefied faces; unless they don’t have emotions like joy, anger, sadness, and happiness.’ His wife adds, ‘The food and daily commodities for Chinese people on the mainland are strictly rationed. Unless they have food or clothing coupons, they don’t have food to eat or clothes to wear. People’s residency, migration, and work are assigned by supervisors; they cannot freely choose. When visiting relatives in other regions, they have to have pass permits. Nowadays, because the population is so enormous, people’s marriages and childbearing have to be

approved by supervisors, too. [...] The mainland today is so colourless, so oppressive; it gives a sense of suffocation.' Following this, their host in Taiwan concludes, 'The two sides across the Strait have different lifestyles, which proves the effect of the difference between the Three People's Principles and communism. Therefore, bringing the fruit of the Three People's Principles back to the mainland is the aspiration and the responsibility of all Chinese people.'

Other than merely offering an example of Taiwan government's propaganda against the PRC, these textbook designs also manifest several intriguing points: First, the fabrication of the fictional American characters, Gu and Lu, who in making a comparison between life in Taiwan and China reveals that the evaluative system is based on the perspective of modern Western countries, particularly those of Americans. It shows that one of the judging factors of this cultural hierarchy is, as discussed above, a society's level of Western modernity, which is represented by the index of its people's well being, including their wealth (the supply of food and daily commodities) and freedom. Second, in this comparison between Taiwan and China as modern and un-modern, developed and underdeveloped, civilised and uncivilised, happy and unhappy, the KMT further reinforced its ruling legitimacy on Taiwan by asserting that it is the only party capable of leading Taiwan to a blossoming future. In fact, this capable, superior image of the party depicted in primary school's textbooks can be used to disparage not only the CPP but also the DPP. Finally, the comparison may influence people's Chinese and Taiwanese at least in two ways. It can, on the one hand, reinforce Taiwanese people's Chinese identity by reminding them of the ultimate, unfinished nationalist goal: to retake the mainland and save our comrades left on the continent under communism. On the other hand, by emphasising the difference (hierarchy) between the two regions, it also strengthened the people's identity of being Taiwanese and being citizens of the ROC.

China's Great Economic Growth Challenges the Cultural Hierarchy
between PRCs and ROCs in Taiwan

The KMT's propaganda of China's image of poverty and backwardness was based on and supported by the huge factual difference between the economies of Taiwan and China. It is true that the annual purchasing-power-parity (PPP) per capita GDP of Taiwan has been greater than that of China for decades; particularly before 1990, when they were ten times greater.⁵⁷ After the 1990s when Taiwanese people were allowed to go to the mainland to visit relatives, tourism, and even for business, they were able to observe for themselves the inferior situation of people on the mainland. At the same time, visits by people from the PRC to Taiwan were strictly regulated, and those who came to Taiwan were either labour-intensive immigrant workers or immigrant brides.⁵⁸ This situation reinforced the poor image of the PRC Chinese.

However, the picture has seemed to change. Since China has achieved greater economic success, particularly in the late 2000s, the cultural hierarchy that endows Taiwanese with a sense of superiority based on their higher standard of living has been seriously challenged. The visit of a fabulously rich Chinese businessman, Chen Guangbiao, and his extraordinary generosity to the poor on Taiwan provides a vivid actualisation of this change. Chen is well known as 'the greatest philanthropist in China' (*zhongguo shoushan* 中國首善). He was given this title by the Chinese media in 2008 because he donated 810 million CNY (about 81 million GBP) to charity in 2007, the largest amount seen from any Chinese philanthropist. The Premier of the PRC at that time, Wen Jiabao (溫家寶), praised him as 'an entrepreneur with good will, compassion,

⁵⁷ Data refer to *indexmundi.com*: 'China GDP – per capita (PPP)' [http://www.indexmundi.com/china/gdp_per_capita_\(ppp\).html](http://www.indexmundi.com/china/gdp_per_capita_(ppp).html); and 'Taiwan GDP – per capita (PPP)' [http://www.indexmundi.com/taiwan/gdp_per_capita_\(ppp\).html](http://www.indexmundi.com/taiwan/gdp_per_capita_(ppp).html).

⁵⁸ For instance, Chinese brides were discriminatorily called *dalu-mei* (大陸妹; literally, mainland chick) in the society, and they are often suspected of coming to Taiwan by faking marriage to Taiwanese people for personal gain (job opportunities or better wages).

and care for suffering people' due to Chen's assistance to victims of the 2008 Sichuan Earthquake. It is reported that as of October 2010 Chen had donated 1.4 billion CNY (140 million GBP) to philanthropic causes in China.⁵⁹

Chen came to Taiwan to spread his generosity in 2011. His showy philanthropy caused a huge fuss there because the objects of his altruism were not charitable groups or organizations but individuals, and he bestowed red envelopes, printed in gold characters with 'The Chinese nationality is one close family' (*zhonghua minzu yijiaqin* 中華民族一家親), with a minimum of 10,000 TWD (around 200 GBP) cash inside, directly, one by one, upon needy people. Some beneficiaries even knelt down before Chen to show their gratitude. However, many political commentators and politicians did not laud Chen but rather denounced him. Some Taiwanese nationalists pointed to the slogan printed on the envelope, charging that Chen's charity was actually a fiendish plot to seduce Taiwanese people into supporting future unification with China. Some KMT supporters depicted Chen as humiliating Taiwanese people, claiming that the way he gave away his money, so openly and publicly, and the outcomes this created (such as people kneeling down to him), made Taiwanese society feel uncomfortable.⁶⁰ Chu Lilun (朱立倫), a political star of the KMT and the head executive of Taoyuan County at that time, commented that Chen should have been more 'pragmatic, dignified, low-profile' (*wushi, zunyan, didiao*; 務實, 尊嚴, 低調).

⁵⁹ 'Chen Guangbiao: *lizhi chengwei zhongguo shoushan jian shoufu*' ('Chen Guangbiao: Ambitious of the greatest benevolent and philanthropist in China'), *Phoenix New Media*, October 11, 2010, <http://finance.ifeng.com/news/people/20101011/2692344.shtml>.

⁶⁰ The response of the vice chairman of the Mainland Affairs Council, Liu Dewei, was a good example: He recommended Chen Guangbiao to read the Diamond Sutra, which instructs people not to be obsessed with fame. In other words, Liu was asking Chen to keep a low profile when doing the charity in Taiwan (the news can be found in the TV news of CtiTV on January 28th 2011: <http://stafabanddownload.xyz/songs/陸委會建議陳光標-多閱金剛經-民視新聞/>). I do not intend to assert that Chen's behaviour was problematic because he was from the mainland. Rather, I only present that some people in Taiwan did feel Chen's benevolence unbearable, and this feeling was relevant to their sense of superiority over general mainlanders.

Why should Chen have kept a low profile? The problem was actually not the public display of Chen's generosity; the real problem was that, first of all, Chen was from China, a PRC person. There would have been no problem had he been a Taiwanese entrepreneur distributing red envelopes to the poor—but when a rich Chinese man did so, it directly challenged this myth that people in China were poorer and more backward than Taiwanese people. Chen's show of giving money to the poor in Taiwan was a slap in the face to those who believed the myth because it presented the fact that some Chinese people at least were much richer than the Taiwanese. Another issue was that Chen handed out his money in red envelopes. Elders giving red envelopes to children on Chinese New Year's Eve is an old, popular Han-ethnic tradition in Chinese and Taiwanese society; thus, the red envelope symbolises not only good luck and blessings but also a relation of hierarchy, in which the giver is more senior, more economically powerful, and more socially dominant than the receiver. The manner of Chen's donations thus implied that he was more powerful and more respectable than Taiwanese people.

Chen's charity was disturbing not only because it directly stoked the anxiety of many Taiwanese people about China's incredible speed of economic growth but it also, consequently, directly challenged the cultural hierarchy in Taiwanese society. Not that this challenge was all that successful: the cultural hierarchy that disdains the Chinese people still exists, and continues to be used to reinforce and reconcile the emerging anxiety in Taiwanese society. The defence mechanism is along these lines: 'even though you have more economic power and are richer than me, you are still culturally inferior' (that is, you have vulgar tastes, improper manners, etc.). The constructed images of *luke* (陸客; Chinese tourists) in Taiwan, provide a good example. In some news reports, these tourists typically have two features: one is that of rich customers with incredibly high

consumer power,⁶¹ and the other is that of an uncivil disordered crowd who shouts and behaves inadequately in public spaces.⁶² This discriminatory campaign (stigma labelling) serves to dissipate the anxiety of Taiwanese people over the rise of the PRC.

The Cultural Hierarchy that Creates Differential Images between Easterners (Chinese) and Westerners

The third cultural hierarchy presented here is the one that offers specific values for the concepts of Easterners (*dongfangren*; 東方人) and Westerners (*xifangren*; 西方人). Here, as explicitly illustrated in Chapter 2, the idea of ‘Easterners’ can refer to ‘Chinese,’ ‘Asians,’ or to those who have yellow skin, black hair, and black eyes, while ‘Westerners’ can refer to any of those who do not fit into these phenotypes, particularly Caucasian people with blond hair and blue eyes. This dualistic classification and its terminological references can be traced back to the late Qing Dynasty. The formation of these discourses was framed in terms of a moral dualism that conceived the Chinese (Easterners) as the oppressed victims of Western imperialism, and Westerners as the bullies who oppressed and exploited other regions. This moral dualism, that is, the East-West antagonistic discourse/narrative, implies in its essence a form of hierarchy, placing the powerful and superior Westerners above the powerless and inferior Easterners. This power relationship permeates into and influences the cultural realm, collaborating with the cultural hierarchy that gives Westerners higher socio-cultural values than Chinese, per this chapter’s previous discussion on how Western modernity became the major index for the hierarchy set between the PRCs and the ROCs.

⁶¹ An article in *Next Magazine* titled ‘Baoru lamei fandan peiwan, zhongguo jufu Taiwan haodu’ (‘爆乳辣妹飯店陪玩 中國巨富台灣豪賭’; ‘Accompanying with Big-boobs Girls, Chinese Millionaires Played Luxury Card Games at Hotels in Taiwan’), November 28, 2013, is a good example. <http://www.appledaily.com.tw/appledaily/article/headline/20131127/35467126/>

⁶² For instance, a report on Apple Daily, ‘Luke lingrenyan, “niushi” lie qizongzui’ (‘陸客令人厭《紐時》列7宗罪’; ‘Chinese Tourists Disgust, “New York Times” Lists the Seven Sins’), October 7, 2013. <http://www.appledaily.com.tw/realtimenews/article/international/20131007/270507/>

This type of East-West cultural hierarchy is observed more among the interviewees who identify themselves as Chinese rather than those who regard themselves as solely Taiwanese. This is because the concept of Easterners is much closer to the idea of Chinese than to the idea of Taiwanese. As a result, the cultural hierarchy and the narrative constructed on the basis of the distinction between Easterners and Westerners can easily interpellate subjects who more readily see themselves as Chinese. By contrast, the interviewees who identified themselves as Taiwanese rarely express concern about this cultural hierarchy. What really bothers them are other forms of cultural hierarchy (such as the one set between Mandarin speakers and Tayu speakers, or the one set between the PRCs and the ROCs). It means that, even if they have experienced a sense of Westerners' superiority and Easterners' inferiority, they are reluctant to associate Chinese with Easterners, due to their rejection of Chinese identity. Yuxin is a good example.⁶³ She conceptually associates the idea of the 'West' with wealthy regions, and she thinks that many Taiwanese people admire and long for a Western lifestyle. Nevertheless, although holding this image of cultural hierarchy that subordinates her own identity as an Easterner, Yuxin refuses to regard herself as Chinese. She simply dissociates the generic idea of Chineseness from the idea of the benevolent but less developed Easterners.

Among people who see themselves as Chinese, the cultural hierarchy based on the distinction between Easterners and Westerners seems to reinforce their Chinese identity. Kaiwen and Haoping are good examples; they claim Chinese identity and define this grand generic idea in terms of people with yellow skin and black eyes. Apart from the anti-imperialist discourse that attracts them to embrace Chinese identity, both express their perception of the dominant status of Westerners, which is actualised in their images of language usage. For instance, Kaiwen says he loathes Americans because

⁶³ See footnote 51 for Yuxin's profile.

he has been forced to learn English, a foreign language for which he has no aptitude. The same can be said of Haoping; one of his reasons for supporting unification with China is that if this takes place, he will not have to speak English, because a new, powerful Chinese nation will dominate the world, and all other people in the world will have to learn Mandarin instead. They both sense the superior position of the Western powers and acknowledge their own inferior position (as Easterners/Chinese) and, with deep feelings of injustice and resentment, both aspire for China to get stronger to counteract this hierarchy in the near future.

Another example is Jane.⁶⁴ As introduced in the previous chapter, she was born in 1977 in the US, came to Taiwan for her early education, and then went back to the US for college. Jane holds more fervent feelings towards China/Chinese than the average person in Taiwan,⁶⁵ and Chapter 3 argues that a crucial element that forges and shapes her Chinese identity is the East-West antagonistic discourse.⁶⁶ That being said, the discourse of the East-West cultural hierarchy can be also seen in Jane's case, particularly when she explains some aspects in which she might not feel proud of Chinese people:

JANE: ... I don't think I would not feel proud of being Chinese ... It's not relevant to whether you are Chinese or not; it's about your education and social consciousness. These can be improved! For example, if you go some places abroad, say, Chinatowns in the US, you might wonder why these places are so dirty. But other places in the US can be so clean. People would say Chinese people are untidy and selfish. They only clean their own doorways and care nothing about their communities. However, Americans, or foreigners [here Jane actually refers to Westerners], regard the community as their 'face' [like personal fame or one's reputation], so they will organise the community to be very tidy, and everyone will monitor each other. If they see their neighbours littering, even if it's not on

⁶⁴ Jane claims Chinese identity and holds great passion for China and Chinese people. She fervently supports Taiwan's unification with China and believes by doing so Taiwan can share the benefit of China's great economic growth, and the united Chinese nation can become a world superpower. For her political party affiliation, Jane constantly supports the KMT. She dislikes the DPP and blames it for the severe provincial conflict in Taiwanese society.

⁶⁵ In the interview Jane chose to identify herself as both Chinese and Taiwanese without prioritizing any of them. Her option is rare because most participants who claim the dual identity would at the same time prioritize Taiwanese identity. Judge from that, it can be said that Jane possesses more fervent feelings for China/Chinese than average people in Taiwan who claim Chinese identity.

⁶⁶ Another factor that contributes to Jane's Chinese identity, for instance, is her family (who insisted on Jane's early education in Taiwan to receive proper 'Chinese' education).

their doorways but on a common street, they will ask them not to do that, because littering does not just affect one person; it affects the whole community. But Chinese don't have this concept, and that's why you see our untidy streets and ill-mannered society. This is the difference in cultures, and this can be improved. That's why I have no problem of being Chinese. This is merely the matter of education.

Clearly, Jane thinks some (if not all) Chinese people are culturally inferior to Westerners by lacking of public consciousness and civility. I argue that her idea of this East-West cultural hierarchy reinforces her perceptions of racial discrimination that she encountered while studying at a college in the US. Those discriminative experiences served as the foundation of Jane's belief about the East-West antagonistic narrative. A hierarchal stereotype functions like a lens through which people of subordinated groups can easily interpret their interactions with dominant groups as experiences of depreciation and discrimination. These perceived experiences can further reversely consolidate the stereotype, or generate or reinforce the existing ethical narratives. The case of Jane plainly demonstrates the close and inextricable link between these two forms of discourse.

Moreover, this perception of East-West cultural hierarchy does not hinder Jane from claiming Chinese identity—she is still very proud of being a Chinese. Why? The rationale is: by attributing the inappropriate behaviours and poor manners of Chinese people to their lack of education, Jane believes these shameful characteristics are not the essence of a Chinese. Therefore, the backwardness of Chinese people can be improved, perhaps by promoting education, and perhaps in the near future, when China becomes a developed country.

Conclusion: Cultural Hierarchy and Identity

This chapter investigates the influence of socio-cultural values on identity formation. By defining the value of generic concepts, cultural hierarchy attracts individuals to identify with the higher-value concepts. The chapter has examined three types of cultural hierarchy that associate the ideas of Chinese and Taiwanese with specific values. It also reveals various social discourses and social relations developed over recent history that forge and shape these cultural hierarchies in Taiwan, including the ROC's modern Chinese nationalism, and the traditional political ideology of the Mandate of Heaven and the heritage of logos, the provincial-origin conflict in Taiwan, the Cold War antagonism between the PRC and the ROC, etc. The dominant class manages to reinforce the effect of these discourses (and therefore that of the cultural hierarchies) through institutional means, such as national education and language policy as suggested in Bourdieu's theory, to maintain its advantaged status in the society, and to bolster its feelings of superiority.

However, as previously mentioned in this chapter, placing too much emphasis on institutional influence can lead to several analytical problems. The first is ignoring other non-institutional influence. As discussed, cultural hierarchies can be constructed and disseminated on very personal or interpersonal levels. For instance, Meizhu's comparison between Japanese army and Chinese soldiers may come from her own perceptions; Weiting's impression of *waishengren's* superior social status also results from his interaction with *waishengren* classmates in childhood. The second problem is neglecting individuals' subjectivity. Stressing the role of the institution implies the necessary success of the institutional influence. Yet, this is not always true—the operation of instructional power might fail. Yen's case provides a good example of this. Yen had been immersed in the Chinese nationalist education promoted by the KMT, but claimed that he never identified himself as Chinese because the concept is too splendid to suit him.

The third problem that arises from disproportionately stressing the institutional effect is its inability to explain the dynamics between agents, structural discourses, and identities, or, simply put, the subjects' different responses when facing the enticement of cultural hierarchy. Generally, this chapter identifies four potential types of response—to conform to the value system, to fight against it, to ignore it, or to fail to recognise its existence. The reports of both Dongming and Meizhu show their propensity to conform to existing social values and authority. When Dongming decided to serve in the military, to join the Nationalist army and to insist on his Chinese identity, he was guided by the cultural hierarchies and social values in his surroundings (being a soldier means having a swagger, being a KMT officer is more awe-inspiring than being a CCP soldier, and being Chinese is superior to being Taiwanese). When Meizhu expresses her admiration for and identification with Japanese rule and the KMT regime regardless of her inferior social status relative to those dominant classes, she also conforms to the dominant social structures of the evaluative system.

Yet some participants have declined the interpellation of the dominant cultural hierarchy. Yen, Weiting and Kenbo, for instance, oppose the structure that endows *waishengren* with a superior status relative to *benshengren*, and Jane resists the hierarchy that prioritises the status of Westerners. Their reports show two different patterns of resistance. The first one occurs when the subject does not have an alternative choice of identity and can only take the inferior position and then develop a suitable defence mechanism to alleviate the disadvantage. Jane is one who implements this strategy. She must accept that she is and will always be an Easterner in the dualistic classification between Westerners and Easterners, because, for her distinctive racial phenotype, she can never be a Westerner. Although she acknowledges that Westerners are more modern and thus more civilised than Chinese people, the cultural hierarchy reinforces her Chinese identity, as manifested in her fervent aspiration that the Chinese people should

be united and all work together to make the Chinese nation a superpower to prevail over Western imperialists.

The second pattern of resistance occurs when the hegemonic identity classification is not rigid and allows the subject to opt for the superior identity. Participants such as Yen, Weiting, and Kenbo can follow Meizhu's path by conforming to the cultural hierarchy that disadvantages *benshengren* and identifying themselves as Chinese. Nonetheless, they do not; rather, they seek to challenge the Mandarin-Taiyu cultural hierarchy when they reject Chinese identity and embrace a Taiwanese one. This is because, to these subjects, other value-oriented discourses (such as the anti-KMT discourse and anti-*waishengren* narrative, illustrated in Chapter 3) have greater power to guide and coordinate their perceptions, actions, feelings, and identities.

The third way to respond the operation of cultural hierarchy is to ignore it or to dissociate cultural hierarchy from identity formation. Both Kaiwei and Haoping recognise the cultural hierarchy in language usage and perceive that some people in Taiwan believe speaking Mandarin is superior to speaking Taiyu. Yet this perception seems not to influence their Chinese/Taiwanese identity. It is partly because they are too young to have experienced the previous period of severe provincial-origin conflict in Taiwan, and partly because they are indeed bilingual in those two languages. As a result, the cultural hierarchy in language that they perceive in Taiwanese society does not disadvantage and trouble them; it does not inspire passionate feelings of injustice and resentment that would forge and shape their identities. They have simply learned how to strategically use their bilingual skills in the various contexts.

That being said, there are also individuals who fail to recognise the operation of cultural hierarchy. For instance, one participant, Shuhui,⁶⁷ whose case is discussed in Chapter 2, does not think that speaking Mandarin is superior to speaking Taiyu. She does

⁶⁷ See also footnote 52 for Shuhui's brief profile.

not think that *waishengren* are superior to *benshengren*, either, because she has no provincial-origin concept at all (she does not know what *waishengren* and *benshengren* really mean and has not noticed a conflict). On the contrary, she thinks that speaking Taiyu is much more comfortable and intimate than speaking Mandarin. When encountering a person who speaks Taiyu abroad, Shuhui thinks he or she comes from Taiwan and suddenly feels a sense of closeness and even relief because she believes she just found one of her own and someone on whom she can rely.

Back to the theoretical discussion, my point is, stressing on the role of institution is incapable of adequately exploring these various dynamics between subjects and social discourses. Moreover, the institutional approach cannot explain the changes of the hierarchies, either. Indeed, these cultural hierarchies are challengeable and mutable. For instance, the Mandarin-Taiyu hierarchy is challenged by the rise of Taiwanese nationalism; and the ROCs-PRCs hierarchy is tested when the PRC attains remarkable economic growth. Sometimes these changes generate new cultural hierarchies. For example, in his backlash against Mandarin's hegemony, Kenbo attaches much importance to speaking Taiyu and considers it a major criterion of Taiwanese-ness. Yet this in turn creates a new cultural hierarchy, in which Taiyu speakers may enjoy a pride of identification, but those unable to speak it fluently may feel inferior and excluded. Participants such as Jane and Yuxin state that they have encountered such exclusion in their daily lives, and this is one of the reasons why Jane feels hesitant about Taiwanese identity, and why Yuxin opposes the DPP (she blames the party for this form of ethnic exclusion).

My analyses reveal that in order to influence identity construction, cultural hierarchy must compete with other value-oriented discourses that also prompt individuals to adopt particular identity positions. Put differently, I argue that the various dynamics between the fieldwork subjects and discursive hierarchies can be adequately

explained by discursive competition. On the one hand, Dongming and Meizhu embrace the cultural hierarchy that gives Mandarin speakers superior status and welcome its influence on their identities because they hold this form of socio-cultural value in high esteem. On the other hand, while Yen, Weithing, and Kenbo perceive the same cultural hierarchy, they refuse to let this form of socio-cultural value affect their identifications because they give other types of values—i.e., moral values generated in various ethical narratives—much greater weight.⁶⁸ Identity formation can then be seen as the result of contention of numerous value-oriented discourses. Each value-oriented discourse invites the subject to take sides and to make choices to satisfy paramount moral or emotional needs. Cultural hierarchy, as one of these discourses, is able to forge and shape identity by setting socio-cultural values and offering a framework that its subjects can use to derive pride, or promote a sense of superiority, or alleviate anxiety.

⁶⁸ Usually, with regard to national identity, the effect of cultural hierarchy is more discernible in respect of people who are not particularly motivated by ethical narratives of nationalist ideology; generally, nationalist ideologies are more powerful than cultural hierarchy in provoking nationalist feelings.

Political Ideologies

Introduction

The Working Definition of Ideology and the Mechanism of Image Association

The last but not least value-oriented discourse in my analysis of identity formation is political ideology. This chapter demonstrates how this type of political thinking and value preference exercise its influence on identity.

Since the idea of ideology was introduced during the French Revolution¹ and intellectually developed by Karl Marx, contemporary conceptualisation of the term can be broadly classified into two categories. The first one is the Marxist perspective, which, as Michael Freeden describes, presents ideology as ‘a product of class and associates it primarily with a ruling class, so that each society develops only one ideology serving the interests of the rulers’.² In this paradigm, ideology is understood as a large-scale collective consciousness of falsehoods that maintain the functioning of modern capitalism. The other categorisation of ideology comes from the political-science perspective, particularly in the scholarly tradition of America, which describes ideologies as ‘idea-complexes containing beliefs—encompassing consciously or unconsciously held values, understandings, interpretations, myths, and processes, as well as providing plans of

¹ Robe Eccleshall, *Political Ideologies An Introduction* (London and New York: Routledge, 2003), 3–4.

² In Freeden’s analysis, ideology of this paradigm possesses the following three attributes: First, it is based on the idea that ‘human thinking reflects socio-economic practices’ or, more precisely, the practices of ‘the capitalist mode of production and its material contradictions’. Second, ideology tends to be disguised and dissimulative; it is conceptualised as a ‘distorted or inverted reflection of alienated socially produced thought [which is opposed] to true consciousness’. Third, ideology serves the interests of dominant classes; it is one of the ‘significant functions of power, domination, and exploitation in the

action for public political institutions; and in doing so they act as devices for mobilizing mass political activity'.³ In this paradigm ideology is regarded more as an individual's set of ideas, political beliefs, and value preferences and may have various forms.

Apparently, these two perspectives are in fact different in the aspects and issues they aim to address, but with regards to the attributes of ideology, the two approaches share a certain similarity. For instance, Freeden proposes five characteristics that can generally describe the idea of ideology:

First, ideologies are importantly attached to social groups, not necessarily classes. Ideologies are produced by, directed at, and consumed by groups. Second, ideologies perform a range of services, such as legitimation, integration, socialization, ordering, simplification, and action-orientation. [...] Third, ideologies are ubiquitous forms of political thinking, reconceptualizations of existing or imagined social worlds. [...] Fourth, ideologies are inevitably associated with power, though not invariably with the threatening or exploitative version of power. For inasmuch as ideologies justify certain political decisions and encourage political action, they evoke power as the influence and direction of human beings. [...] Fifth, ideologies are distinct thought-products that invite careful investigation in their own right.⁴

His descriptions correspond to Terry Eagleton's analysis,⁵ which also conceptualises ideology as having six characteristics. From the most general to the narrowest description: first, ideology is 'the general material process of production of ideas, beliefs and values in social life'.⁶ Second, 'a slightly less general meaning of ideology turns on ideas and beliefs (whether true or false) that symbolise the conditions and life experiences of a specific, socially significant group or class'.⁷ Briefly speaking, ideology in this definition refers to a worldview of a specific group. Third, ideology could be regarded as 'the promotion and legitimation of the interests of such social groups in the

political and economic realms'. See Michael Freeden, *Ideologies and Political Theory* (Oxford: Oxford University Press, 1998), 14–15.

³ Ibid., 16.

⁴ Ibid., 22–13.

⁵ Terry Eagleton, *Ideology: An Introduction* (London; New York: Verso, 2007).

⁶ Ibid., 28.

⁷ Ibid., 29.

face of opposing interests’,⁸ Fourth, ‘dominant ideologies help to unify a social formation in ways convenient for its rulers’.⁹ Fifth, ‘ideology signifies ideas and beliefs which help to legitimate the interests of a ruling group or class specifically by distortion and dissimulation’.¹⁰ And the final characteristic of ideology ‘retains an emphasis on false or deceptive beliefs’ and ‘regards such beliefs as arising not from the interests of a dominant class but from the material structure of society as a whole’.¹¹ Both Freedden and Eagleton’s descriptions largely extend the analytical capacity of the ideology; the definition of the concept can vary markedly according to discipline, topic research scope, adopted theories, measured variables, and so on. Ideology may thus be used, for instance: to explore philosophically how human beings behave (or generate subjectivity) under the constraint of moral norms; to illustrate sociologically how a dominant group in a society constructs certain ways of thinking/evaluating to maintain its superior status; or, in a political science context, to discover how certain types of modern political values influence people’s voting, political attitudes, party affiliations, and so forth.

While recognising the characteristics of ideology described by Freedden and Eagleton, this chapter engages in the political science context and uses the concept of ideology to designate a set of political ideas and values, which shapes not only people’s world view but also their political aspirations. More precisely, the research adopts Ball and Dagger’s working definition of ideology as: ‘a fairly coherent and comprehensive set of ideas that explains and evaluates social conditions, helps people understand their place in society, and provides a program for social and political action’.¹²

This strategic definition is apt because my analysis in this chapter aims to demonstrate a specific pattern by which people’s political ideologies exercise influences

⁸ Ibid.

⁹ Ibid., 30.

¹⁰ Ibid.

¹¹ Ibid.

¹² Ball Terence and Richard Dagger, *Political Ideologies and the Democratic Ideal* (London: Longman, 2011), 4.

on their identity formations. This influence is usually achieved in an indirect way, because, unlike other factors in identity formation, such as ethical narrative, imagined nostalgia, and culture hierarchy, the operation of political ideology typically must be mediated by individuals' images of political parties. More specifically, when a political ideology exercises its influence on identity formation, the mechanism that has repeatedly appeared in my fieldwork is usually as follows: the ideology first influences one's party preference (and party images); and then, party preference and party image in turn affect identity preference.¹³ I call this mechanism 'image association', because the subject's identity is indeed forged and shaped in reference to his/her images of political party and to his/her ideology (value preference). In this perspective, ideology may simply be referred to one's value preference, political belief and aspiration, and one's view on the role of government and state, rather than the macro collective false consciousness that steers the development of capitalism.

Discursive Characteristics of Ideology

It may be useful, before commencing our analyses, to discuss further some characteristics of ideology. By regarding ideology as a set of ideas, my research considers it to be a form of discourse: While discourse generally refers simply to statements, that is, to 'all utterances or texts which have meaning and which have some effects in the real world',¹⁴ political ideology refers to a specific type of statement that attempts to shape people's political views and to guide their political actions. From this point of view,

¹³ While the relationship between an individual's images of political parties and his/her Chinese and Taiwanese identity is presented with great certainty in this chapter, my analytical findings do not suggest a specific causal relationship between ideology and party affiliation. It is possible that a person supports a certain party because they share similar political views/values, and it is also possible that an individual adopts a certain ideological position because the party he/she trusts promotes this ideology. Nevertheless, ideology does play a very crucial role in the formation of the party images of the subjects in this chapter; they all emphasised certain types of political views when explaining their party affiliation in the interviews.

¹⁴ Sara Mills, *Discourse* (London: Routledge, 2004), 6.

ideology is not a fixed entity. Rather, an ideology can be shaped and even forged by various social discourses and historical contexts. Studying an ideology is thus to study the meanings and the discourses that it conveys.

Many theorists also give the discursive attributes of ideology much weight. The “four Ps” principle of ideology designated by Freeden is one example.¹⁵ The first P is *proximity*, which signifies that ideologies ‘can only be understood when examined within a particular idea-environment of surrounding concepts’.¹⁶ In other words, ideology is a collective group of discourses/concepts. To comprehend a certain type of ideology is to understand not only the political concepts and values gathered within this discursive pool of ideology, but also their entwined relationships. The second is *priority*, which stands for the notion that ‘the meaning of every political concept in an ideology, as well as of the general arguments of that ideology, is dependent on which concept (and which conception of each concept) are allocated core significance and which are relegated to the periphery of the ideology’.¹⁷ The third is *permeability*, which suggests that political ideas, concepts, and conceptions can be shared by various ideologies. ‘Ideologies are not hermetically sealed: they have porous boundaries and will frequently occupy overlapping space’.¹⁸ Finally, *proportionality* ‘refers to the relative space within each ideology allotted to a particular theme, or cluster of concepts’.¹⁹ Freeden explains that even within a particular theme, an ideology sets priorities. For instance, ‘[m]ost libertarians overemphasise individual liberty at the expense of other liberal values such as sociability, rationality, or progress’. The principle of proportionality thus relates to how an ideology presents itself (to the public).

¹⁵ Michael Freeden, *Ideology: A Very Short Introduction* (Oxford: Oxford University Press, 2003).

¹⁶ *Ibid.*, 61.

¹⁷ *Ibid.*

¹⁸ *Ibid.*, 64.

¹⁹ *Ibid.*

Besides these features of ideology, three more attributes can be found in the relationship between ideologies and their subjects. First, as a form of discourse, ideologies can be held in plurality. A single subject can hold multiple ideologies at once. For instance, a person can be both socialist and nationalist, and sometimes there is a specific term coined to designate this mixed ideology—in this instance, socialist nationalism. Second, among all the ideologies possessed by a subject, one ideology may obtain hegemonic power in influencing this person's worldview as well as his/her actions. Finally, a subject may give his/her chosen ideologies different weight in different contexts or with respect to different issues. It is conceivable that a person who takes a liberal view on national policies on international trade might adopt a more socialist position where domestic issues of social equality are concerned.

In this research, viewing ideology as discourse poses two crucial benefits. First, by dismantling ideology, the approach allows a more profound analysis of various ideologies. It reveals, for instance, that to understand conservatism is to know what values conservatives hold, what social issues particularly worry them, and what political goals they are eager to achieve. In that sense, the approach affords more accurate analyses by exploring various discourses (e.g., values and aspirations) attached to any given ideology. Second, the approach can authentically explain relationships between ideology and identity by highlighting the role of political party image. More precisely, its mechanism of image association—that is, a process of discursive articulation—joins these three elements by virtue of their shared political values. With this mechanism, identity can gain the momentum need for mobilisation, thereby prompting its subjects to take action in the name of the value it represents.

Four Types of Ideology in Taiwan

The ideologies discussed in this chapter are specified according to the systematic technique developed by Strauss and Corbin.²⁰ In other words, the categories of sets of beliefs and worldviews presented in this chapter are generated from my empirical fieldwork, produced by means of methodological instruments developed by the grounded theory paradigm, including open coding, axial coding, selective coding, and theoretical comparison. Each of these ideological sets forms a unique pattern by itself, and can be observed in relation to more than one study subject. This bottom-up methodology thus guarantees that the selected ideologies, if properly analysed and described, can be identified in Taiwanese society, and ensures that the formation of these ideologies is closely connected to the development of Taiwanese history.

This chapter addresses four types of political ideologies that are particularly relevant to Chinese/Taiwanese identity in Taiwan. These are: conservatism, patriarchal capitalism (neoliberalism), anti-authoritarianism (political liberalism and socialism), and nationalism. First, a brief illustration of each one: The characteristic of conservatism that I focus on here is its tendency to prioritise admiration for authority and its aversion to radical reform. As for patriarchal capitalism, I define it simply in terms of placing priority on economic development, with the belief that this can and should be efficiently achieved by skilful government leadership. Neoliberalism can be regarded in turn as a sub-ideology of the patriarchal capitalist ideology, in which the role of the free market is particularly stressed. In contrast to the abovementioned ideologies that give much deference to the role of authority, the ideology of anti-authoritarianism, as the name suggests, values resistance to autocracy. I differentiate the anti-authoritarianism generally

²⁰ Strauss, Anselm and Juliet Corbin, *Basics of Qualitative Research: Techniques and Procedures for Developing Grounded Theory* (Thousand Oaks; London: Sage, 1998).

observed in Taiwan into two types, according the different values they prioritise: political liberalism stresses civil and political rights, while socialism goes further, seeking also to address the social and economic inequalities caused by the authoritarian regime. Finally, subjects that I regard as being guided by nationalist ideology are identified according to the three characteristics of nationalism: consciousness of a certain community (nation), a sense of belonging and passionate attachment to the community, and a belief that the community should be endowed with political sovereignty.²¹

These four categories of ideology are closely relevant to the social context and historical development of Taiwan. For instance, because the KMT regime ruled Taiwan for more than five decades after 1945 and is generally perceived to have contributed greatly to Taiwan's economic growth, the party, on the one hand, is widely trusted by people there who have embraced conservative and patriarchal capitalist ideologies. On the other hand, the KMT is likewise the main target of anti-authoritarian dissenters because its rule was characterised by a draconian crackdown and four decades of martial law. This linkage to the historical context is the locus where the mechanism of image association works.²² Briefly put, a conservative, or a person who places their faith in capitalism, is likely to support the KMT and its related discourses, including Chinese identity; and a person who highly values the ideals of democracy is likely to support the DPP and its discourses, including Taiwanese identity, based on the significant role the

²¹ The ideology of nationalism is discussed in greater detail in this chapter. Refer to the text accompanying note 82.

²² An exception can be nationalism, a type of ideology which could be included in Ball and Dagger's category of 'liberation ideologies', which is explicitly illustrated in their work, *Ideals and Ideologies: A Reader* (Boston: Longman, 2011). They designated five characteristics for liberation ideologies: 'First, each liberation ideology addresses itself to a particular group [...] Second, this group is in some sense oppressed by another [...] Third, the ideology aims to liberate the oppressed group from its oppressors not only by removing external obstacles [...] but by exposing, criticizing, and overcoming internal barriers [...] A fourth feature common to all liberation ideologies is their attempt to "raise the consciousness" of the oppressed [...] Fifth and finally, liberation ideologies are also addressed to the oppressors, who [...] are enslaved by their own sense of superiority' (ibid., 326). Nationalism, as one type of this liberation ideologies, addresses itself to a particular group, designates clearly its enemy (usually another group), and prioritises the aspiration of fighting against the oppressing dominant group. It shapes and forges one's identity on the basis of its group classification; it does not need to influence its subject's identity via the mechanism of image association.

party had played in the anti-authoritarian movement prior to 2000. This chapter is arranged according to these four different types of ideology. In each section, I delineate the key principles of each political ideology and then, by presenting solid empirical evidence from my fieldwork research, I explicitly demonstrate how political ideologies can affect the formation of Chinese/Taiwanese identity.

Conservatism

Michael Freeden believes there are two common threads that can be identified in all conservative arguments: one is anxiety about change,²³ and the other is respect for the social order.²⁴ Terence Ball and Richard Dagger in *Political Ideologies and Democratic Ideal* also think that conservative factions have as their goal the pursuit of order, stability, harmony, and continuity, while opposing radicalism, innovation, passion, desire, and lack of restraint.²⁵ As a proud and committed conservative, the author of *The Meaning of Conservatism*, Roger Scruton, claims: '[C]onservatism arises directly from the sense that one belongs to some continuing, and pre-existing, social order'.²⁶ Clearly, whatever minor theoretical disagreement may exist among these scholars,²⁷ two common principles—

²³ According to Freeden, conservatives tend to differentiate between two types of change: One is natural, that is, 'modeled on continuous organic growth, rather than on disjointed, planned mechanical leaps and bounds'. The other is thus unnatural, that is, any abrupt and radical alteration. For conservatives, as Freeden depicts, '[o]nly change as growth is legitimate, safe, and steady'. See: Freeden, *Ideology: A Very Short Introduction*, 88.

²⁴ This social order, as Freeden describes, has to be 'founded on laws that are insulated from human control' (ibid.). In his theory, conservatives tend to believe not in human will but, rather, in a permanent social order of 'extra-human origin', which can be God, nature, history, biology, or even economics.

²⁵ Ball and Dagger, *Political Ideologies and the Democratic Ideal* (2011).

²⁶ Roger Scruton, *The Meaning of Conservatism* (South Bend, Ind.: St. Augustine's Press, 2002), 10.

²⁷ For instance, Freeden conceives that a general characteristic of conservative ideologies is suspicion of human will. Actions guided by human will or conducted by human beings can be dangerous and can harm the existing continuity and harmony. However, Scruton endorses the importance of human political deeds, particularly when it comes to organising a political party to protect the esteemed values of conservatism: 'Every society depends upon popular self-respect, respect in the citizens for the order of which they form a part and for themselves as part of that order. This feeling, manifest in patriotism, in custom, in respect for law, in loyalty to a leader or monarch, and in the willing acceptance of the privileges of those to whom privilege is granted, can extend itself indefinitely. And it is from this feeling, which need

‘aversion toward the chronic reform which only an organized party can successfully counter’²⁸ and the priority attached to the social order—seem to be rather undisputed and these serve as the primary analytical units of conservatism in this thesis. 18 participants in my research whom can be labelled as conservatives thus possess these characteristics: They prefer to maintain the status quo, and they all have strong aversion towards reforms and social movements. Among these 18 participants, 12 people identify themselves as both Chinese and Taiwanese; 4 regard themselves as Taiwanese only; one refuses to claim any identities; one states she is neither *Zhongguoren* (Chinese) nor *Taiwanren* (Taiwanese), but *Zhonghua-minguo-ren* (中華民國人; people of the Republic of China, ROC).

The Dual, Conflictive Identity of Conservative Interviewees

Investigating the influence of conservative ideology requires a study subject whose identity pattern is forged and shaped by that person’s party images—images that relate to his/her desire of maintaining the status quo—and whose identity is less connected to the work of other discourses such as Chinese and Taiwanese nationalism. A group interview of three participants, Wanling (female, *benshengren*, 75 years old), her daughter Xinyi (female, *benshengren*, 59 years old), and their friend Yueying (female, *benshengren*, 50 years old), provides a suitable example. My demonstration thus comprises three steps: I first introduce the three participants’ backgrounds and identity patterns. Next, I illustrate how their identity patterns correlate to their party images. Finally, I show the limited influence of both Chinese and Taiwanese nationalism on the formation of their identities.

be neither craven nor endlessly submissive, that the authority of the conservative politician derives.’ See Freedon, *Ideology: A Very Short Introduction*, 15. On the other hand, Scruton believes only an ‘organized party’ can stop aversive chronic reforms’. *The Meaning of Conservatism* at page 4.

²⁸ Scruton, *The Meaning of Conservatism*, 4.

The interview with Wanling, Xinyi and Yueying, conducted at their place of residence, Zhongli City (中壢市),²⁹ begins with the participants' life stories. Wanling was born in the city in 1937, during the Japanese occupation of Taiwan. Her father was a *baozheng* (保正; officially-appointed supervisor of every 100 households) and a landlord with some farmland, which allowed the family to enjoy a slightly better than average standard of living. Wanling recalls that the main meal they usually ate at that time was rice porridge with sweet potato shreds, which would be ranked below eating pure white rice, but at the Lunar New Year's Eve festival dinner, each child was allowed two pieces of chicken. The family had ten children in all, and her family could not afford to send all ten to school; Wanling was kept at home because, at that time, girls were not expected to be given as much education as boys. She helped out with farm work and took care of her younger brothers and sisters on a daily basis.

Wanling was married to her husband at the age of 17 (in 1953). Her daughter, Xinyi, proudly proclaims in the group interview that her father was a descendant of a famous general of the Tang Dynasty. Their ancestors went to Fujian Province of China and then came eventually to Taiwan; such a genealogy, whether real or fictional, implies a claim to elite status. Wanling and Xinyi now run a small noodle shop in Zhongli, and Yueying is their employee. Yueying was born in 1962 in Taipei. She grew up in a poor family and had to take many part-time jobs in her childhood.

Xinyi married a *waishengren* husband who works on the shop floor in a factory that makes zippers. Yueying is married to a *waishengren* too; having this in common consolidates their friendship. In our interview, Yueying makes a joke about Xinyi's

²⁹ Zhongli is the second largest city in Taoyuan County and the ninth largest in Taiwan. The county is within 45 minutes by freeway from the Taipei metropolitan area and thus is a bridge between Taipei, the business and political centre of Taiwan, and the other southern regions. This geographical characteristic not only makes Taoyuan a preferred business location for various manufacturers and distributors, but also generates its very diverse ethnic composition. Further, Zhongli is also famed for the Zhongli Incident which occurred in 1977, a riot that involved thousands of people protesting against a rigged election manipulated by the KMT. The riot is regarded as one of the significant incidents that signalled a coming challenge to the KMT's political domination.

lineage and marriage, teasing her that Xinyi is a descendant of a famous Tang general, but is married to a Xiongnu (匈奴; literally, 'fierce slaves') husband.³⁰ This teasing indeed shows their intimacy because, for this generation, a family's provincial origin could be considered a private matter, a touchy subject that might lead to serious conflict. In the interview Wanling states that there were severe provincial conflicts in the early years; *benshengren* strongly disliked and refused to marry *waishengren*. Yueying also says her mother used to oppose marriage with *waishengren*; she doubted that one of them could offer Yueying a house or a better living. Xinyi explains that this is because when Taiwan was 'returned' to China in 1945, the KMT troops who came to take over Taiwan were not what Taiwanese people expected. They were bedraggled and seemed like tramps, carrying a pole from which hung their few possessions, typically a pot and a sheet. They had not bathed for a long time and had lice. Xinyi says this sight shocked Taiwanese people who were accustomed to the disciplined and orderly appearance of Japanese soldiers, so they began referring to these *waishengren* troops as 'pigs'.

In addition to their 'cross-ethnic' marriages (mixed marriages), Xinyi and Yueying also share many political values and have similar identity patterns. They both profess dual identities, regarding themselves as both Chinese and Taiwanese. Here is Yueying's report:

Q: When we studied at school, each of us was taught to be 'a proper Chinese'. Do you feel the meaning of the term has changed now?

YUEYING: Now [the principle] is '*yi-zhong-ge-biao*' (一中各表; literally, one China, although defined differently by the ROC and the PRC), okay? Can we have one China and define it differently?

Q: What do you mean by that?

YUEYING: According to the principle of 'one China, defined differently' in the 1992 Consensus, I can claim that I am Chinese. But is my Chineseness equivalent to *daluren* (mainlanders)? No!

Q: Do you feel our usage of the term 'Chinese' is different from its previous usage? Has the meaning ... changed?

³⁰ Xiongnu refers to a historic nomadic ethnic group residing in northern China in ancient times, seen by the Han as fierce barbarians. In ancient texts it is portrayed as the main rival of the Han group, which is represented by Xinyi's Tang ancestor in Yueying's teasing.

YUEYING: I think they (the DPP supporters) are just splitting hairs now. They insist that everyone should claim Taiwanese identity and should love Taiwan. But why should we?

Q: Was there no such thing in the past?

YUEYING: No! In the past we were educated to be Chinese, but 'Chinese' referred to 'people of the Republic of China (ROC)' (中華民國的人), not to people(s) of 'that China that is a merger of the both sides of the Taiwan Strait' (兩岸合併在一起的那個中國).

Q: So, you mean the term 'Chinese' referred in the past to all people on the mainland and in Taiwan?

YUEYING: Yes, all. But now 'Chinese' [has changed meaning] in our expression ... We don't say we are 'people of ROC'; we say we are Chinese for short. This is how our generation views it.

Q: Some research would ask participants to choose their identities from the following five options: (1) Chinese only; (2) Taiwanese only; (3) both Chinese and Taiwanese; (4) both Chinese and Taiwanese, but prioritising Taiwanese; or (5) both Chinese and Taiwanese, but prioritising Chinese. Which would you choose?

YUEYING: I would choose both Chinese and Taiwanese and prioritise Taiwanese. It has to be prioritised to reflect our best interests, the benefits of our land. Then, we take the interests of their land into account.³¹

Thus, Yueying would identify herself as both Chinese and Taiwanese, but her dual identity comes with great conflict. To her, the concept of 'Chinese' used to refer also to people on the mainland, but now its meaning has changed, and she strictly limits it to the 'people of the ROC' and excludes people from mainland China from the category. Therefore, when Yueying claims her Chinese (ROC) identity, she is identifying herself as a resident of Taiwan, distinguishing herself from the people across the Strait. Even so, she hesitates to use the term 'Taiwanese' to designate herself, despite the fact that the term is commonly used (and is indeed appropriate) to designate the group that she wishes to identify with in Taiwanese society.

³¹ Yueying and Xinyi seem to share the same identity pattern: both of them would regard themselves as both Chinese and Taiwanese. However, Wanling's identity is different: she would identify herself as Taiwanese only. Yet, as a person of the older generation, Wanling's Taiwanese identity results from the particular terminological usage in the early period in Taiwan. Refer to the last paragraph of this section below for a more detailed discussion.

Conservative Ideology, Party Affiliation, and Chinese/Taiwanese Identity

Apparently, Yueying's hesitation about Taiwanese identity stems from her detestation of the DPP (and its supporters), as she expresses in the interview: 'They insist that everyone should claim Taiwanese identity and should love Taiwan'. Her image of the DPP as a crafty manipulator provoking ethnic conflict in Taiwan can be also observed in the following account:

YUEYING: After the Kaohsiung Incident (in 1979),³² okay, Chiang Ching-kuo also agreed to lift martial law, and then political parties could be established. Yet after the establishment of the DPP, they started to manipulate ethnic conflict. The fiercest time was when Chen Shui-bian ran for Taipei mayor in the election of 1994; they said *waishengren* were elites who oppressed us.

Yet the best example revealing this type of perception of the DPP is when Xinyi explains how she felt about a series of reforms in 1980s Taiwan, that is, the *dangwai* movement (黨外運動; literally, political movements organised and promoted by the people outside the KMT):

Q: Did you support the reforms in the 1980s?

XINYI: I supported Hsu Hsin-liang (許信良) at that time. He was good. I went to his election rallies and attended his speeches. ... I did not support *taidu* (臺獨; Taiwanese independence), but I thought Hsu was good.

WANLING: Don't vote for DPP candidates! You'd better not vote for them. They are bad guys.

Q: You supported Hsu, and then you turned against the DPP. Why?

XINYI: Because of Kaohsiung Incident and Zhongli Incident. We all had settled down here after the KMT came to Taiwan ... Yes, we spoke different languages, and we were actually disappointed in its (the KMT's) performance at that time, but our generation at least had grown up in a rather peaceful

³² The Kaohsiung incident, also known as the Formosa incident (or Meilidao or Formosa Magazine incident), was the culmination of a year of pro-democracy demonstrations on December 10, 1979. The demonstration was set to commemorate Human Rights Day, yet under martial law (1949–1988) the KMT government used clashes at the event as an excuse to arrest the political opposition. Hundreds of people were arrested; eight main leaders were tried and convicted of sedition. The Democratic Progressive Party (DPP), founded in 1986, grew out of this movement and the defendants' lawyers. Some researchers (e.g., Hsiao) believe the incident made many dissenters rethink the legitimacy of the KMT's rule and thus contributed to the subsequent emergence of Taiwanese nationalism.

time. And then everything changed when the DPP started their riots. At the time, I was actually deliberating whether I should send my two boys to Canada.

Q: When was that?

XINYI: Around the 1990s ... How could the DPP revolt like that? Taiwan was originally a peaceful land, and now because of the DPP ... Yes, the KMT changed a lot after the DPP was established. The DPP deserved some credit. But in the end, the DPP was making a mess, a huge mess. Why did they provoke the ethnic issue? We are all ethnically from China. How could they denigrate us as *waisbengren* pigs? I was native born and grew up in Taiwan! I got married in 1978. My husband was insulted and called a *waisbengren* pig in 1994. These DPP elites provoked the ethnic conflict. Chen Shui-bian (陳水扁), Su Tsen-chang (蘇貞昌), Chang Chun-hong (張俊宏) and Chang Chun-hsiung (張俊雄) are all lawyers; they are all high intellectuals, educated at National Taiwan University, and they told those uneducated common people to call us *waisbengren* pigs. This is immoral. [...] They used their knowledge to provoke conflict and to oppose us. We had lived a peaceful life, and we did not try to pursue political interests. Why did they tell those people to insult us? That's so immoral. [...]

Q: Are the party affiliations in Zhongli very complicated? The Zhongli Incident happened at this place, so I suppose there must be some people here supporting the DPP.

XINYI: Generally, Zhongli people are peaceful. People in the southern region of Taiwan are more aggressive. The Zhongli Incident is an exceptional case. We did not expect this kind of thing would happen.

It is clear from this dialogue that the value that Xinyi and Wanling hold dear when choosing their political party is social order, that is, the capability of the party to maintain peace, stability, and security of society. They oppose the DPP because it was the source of riots that created chaos and endangered society, and they support the KMT because it has been the government capable of guaranteeing social stability and peace.³³ Clearly, these party images directly came from their own perceptions of several events in Taiwan in the late 1970s and 1980s, namely, the Kaohsiung Incident and Zhongli Incident. Although Xinyi does recognise that the KMT had a lot of problems, such as corruption and vote-rigging (which caused her to be attracted by Hsu's speeches), she has ended up supporting maintenance of the *status quo* and opposing radical social and political reforms due to her aversion to change. In other words, it is the ideology of

³³ This discourse can also be seen in Huang Guang-guo's book, *Taiwanese Identity and Democracy: The Social Psychology of Taiwan's 2004 Elections* (New York: Palgrave Macmillan, 2006). Huang argues that the KMT elites and supporters tend to accuse the DPP of 'populism', that is, mobilising its supporter against the rich and against *waisbengren* group for its political gain (ibid., 9–11).

conservatism that leads to Wanling, Xinyi and Yueying's party affiliation, which affects and shapes their Chinese and Taiwanese identities.³⁴

The Limited Influence of Chinese and Taiwanese Nationalism on Wanling, Xinyi, and Yueying

I argue that their aversion towards the DPP makes Wanling, Xinyi, and Yueying hesitant about claiming Taiwanese identity, and not the other way around. More precisely, the causal relationship is this: because they dislike the DPP, they hesitate to embrace Taiwanese identity (and other discourses promoted by the DPP). It is not because they oppose the DPP's values and ideas—Taiwanese identity and Taiwan independence—that they reject the party. In their interviews they are not unwilling to claim Taiwanese identity; they just do not like the way that the DPP interprets it. They never object to the idea of being Taiwanese per se; all their resistance revolves around the DPP's words and actions. Further, their opinions on the issue of Taiwan's sovereignty and status can also be seen to support my argument. Xinyi, for example, says she does not support *taidu*, but she thinks of Taiwan as an independent country:

XINYI: There is the Taiwan Strait between us in Taiwan and them, and our political system is democratic. Their government is of men, and ours is of law. Take Hong Kong for example; although the

³⁴ Some might argue that provincial-origin conflict should be the key element in Xinyi's political party affiliation: She is married to a *waishengren* husband (which under Chinese patrilineal custom makes her family *waishengren*) and, therefore, the insult that she believes the DPP paid her would be the main factor contributing to her constant support for the KMT. However, first, the social status of their families might rebut this view. For instance, Xinyi's husband is a factory labourer, and she runs a small noodle shop in Zhongli. Unlike those who work in the public sector or the military, they seem unlikely to receive substantial benefits from the KMT. If they perceive benefit to be gained from the KMT, it is more likely based on a generalised perception that the party improves the economy. From this point of view, it should be the ideology of patriarchal capitalism at work rather than substantial personal interests. Second, in Xinyi's account, not until the Zhongli Incident (1977) and the Kaohsiung Incident (1979) did Xinyi begin to support the KMT; the fiercest conflict based on provincial origin that she perceives occurred when Chen Sui-bian ran for Taipei's mayor in 1994. So, the provincial-origin conflict that Xinyi has encountered may have exerted influence, but her conservative interpretation of the series of social and political reforms in the 1980s in Taiwan also plays a very significant role in forging and shaping her political orientation, party affiliation, and identity.

Liberation Army enters it, it is still independent. So for *taidu*, why do they want *taidu*? Taiwan is already independent. What independence do they seek? This is definitely an issue manipulated by certain politicians.

WANLING: We have always been independent! We rule ourselves!

Unlike some KMT supporters who might argue that Taiwan is not a substantial country but merely a regime or a political entity,³⁵ Xinyi acknowledges Taiwan's sovereignty and believes Taiwan is currently an independent country. To her, Taiwan rules by itself and is distinguished from mainland China. This view clearly is in contradiction to her proclaimed rejection of *taidu* and this inconsistency, once again, can be adequately explained by her aversion towards the DPP. When asking 'Why do they want *taidu*? ...What independence do they seek?', and when accusing 'certain politicians' of 'manipulating' the issue, Xinyi is accusing the DPP. She believes the party's goal of *taidu* is an unnecessary gesture, a pretext for a vicious attempt to seize political power, and a deplorable secessionist notion that tears Taiwanese society apart. In short, what she opposes is not Taiwan's independence on its face, but the DPP's version of Taiwanese independence. And this once again supports my analysis of the influence of the mechanism of image association: Xinyi's political orientation (her view of Taiwan's status) is forged and shaped by her party affiliation (her rejection of the DPP).

The significance of the role of the three women's party images in their identity formation is particularly apparent when the work of Chinese and Taiwanese nationalisms is absent. In fact, Xinyi's and Yueying's conflicting dual identities result from their doubts about Chinese nationalism and about Taiwanese nationalism: On the one hand, although claiming Chinese identity, they still wish to draw a clear distinction between themselves and *daluren*, the current residents of China; they seem not to regard *daluren* as the people of their imagined political community. On the other hand, although claiming

³⁵ People holding this view usually refer to the 1947 ROC Constitution and believe the national territory is all of the Chinese mainland plus Mongolia, arguing that Taiwan following the 1949 separation resulting from the Chinese civil war is not a substantial country (but merely a regime or a political entity).

Taiwanese identity for themselves, they wish to draw another clear distinction between themselves and those radical Taiwanese nationalists who fervently promote Taiwan independence to be achieved *de jure* as well as *de facto*. Another example is seen in Wanling's choice of terms. As the mother of Xinyi, a 75 year-old *benshengren*, she tends to use the term 'Chinese' only to refer to the people of the ROC, as she does many times in the interview. In other words, unlike younger Xinyi and Yueying, who possess dual identity, Wanling professes Taiwanese identity only and excludes herself from the idea of 'Chinese'. Her identity is not dictated by Chinese nationalism or by Taiwanese nationalism. Rather, it results from the common terminology of her early surroundings (where Chinese referred to *waishengren* only and Taiwanese meant *benshengren*). The point is, neither the dual identity of Xinyi and Yueying nor the Taiwanese identity of Wanling is directly forged and shaped by any nationalism in Taiwan.

Resemblance and Nuance in the Anti-DPP Discourse

We can find several resemblances between the operation of conservative ideology and that of the anti-DPP discourse, an ethical narrative discussed in Chapter 3. The anti-DPP narrative frames the DPP as a devious political party that manipulates the provincial-origin issue and causes ethnic conflict in Taiwanese society. It is also portrayed as a treasonous gang of secessionists that aims to overthrow the ROC to establish a Taiwanese nation state. Therefore, both the DPP narrative and Wanling and her friends' conservative ideology give much weight to the perceived character of the DPP. To both of these subjects, the DPP is to blame for social disorder and political conflict.

Yet, there are still nuances between these two types of discourse that are worth distinguishing. The most significant one is that the anti-DPP narrative regards the DPP as the malignant *waishengren*-excluding group, or as promoting secessionism. The

narrative thus usually provokes strong emotional responses of aversion against the party. On the other side, the conservative subjects addressed in this section put emphasis on the party's image as insurgents. Participants of this kind do not tend to see the DPP as a party that manipulates ethnic conflicts for their political interest. Or, they tend to believe that both the KMT and DPP are playing the ethnic card. Further, generally, conservative participants may not deem Taiwan independence as secessionism. For instance, both Wanling and Xinyi conceive that Taiwan has already been independent. They do not oppose Taiwan independence; they loathe and oppose the concept only when the DPP talks about it.

This difference implies that the subjects of these two discourses are indeed motivated by two different psychologies: the subjects of the anti-DPP narrative oppose the DPP (and its related discourses) owing to a sense of morality (or patriotic sentiment), whilst the subjects of the conservative ideology oppose the party (and its related discourses) due to their desire for social stability and security. This nuance is important not only because it is a simple fact that these are two different mental modalities and motivations, but also because changing these subjects' party affiliations, or identities, will require very different strategies. More specifically, if a DPP candidate wants to gain the support of a subject of the anti-DPP narrative, that candidate will probably have to dissociate him/herself or the party from the issues of provincial origin and Taiwan independence. Likewise, if the DPP wants to attract votes from conservatives like Wangling and her friends, it has to show itself capable of maintaining the social stability and security.

Patriarchal Capitalism (and Neoliberalism)

Principles of Patriarchal Capitalism and Neoliberalism

The ideology of the KMT's early economic policies can be described as something akin to 'patriarchal capitalism'. I coined this term to emphasise its two major principles. The first is the principle of conventional capitalism, which has profit-making as its goal. However, the subject of patriarchal capitalism is different from that of traditional capitalism. Traditional capitalism aims to maximise individual interest and claims that by doing so, it will also maximise the collective interest. However, the logic of patriarchal capitalism goes in the opposite direction: it believes that maximising the collective interest will maximise the individual's interest. More precisely, patriarchal capitalists believe that improvement of the whole society's³⁶ welfare will also benefit all members of society, and the benefit gained by the upper class will trickle down to the lower class. From this point of view, the first principle of patriarchal capitalism should be more correctly interpreted as the aspiration for the economic development of the whole society rather than for individuals to profit.

This leads to the second principle of patriarchal capitalism: respect for authority or, more precisely, its emphasis on the role of the nation state, or more specifically, the heads of state and government. Unlike traditional capitalism which places an emphasis on individual action, patriarchal capitalism places its reliance on a capable leader. Since the first principle of this ideology is to achieve development and accumulate wealth for the whole society, the nation state, with its power to manage all of the national resources and capital, is the actor best situated to achieve that goal. All individuals in the society

³⁶ Moreover, the 'society' is usually imagined as 'nation state' in this ideology. The improvement of the collectivity's interest thus means the improvement of the nation state's interest.

need only listen to, follow, and cooperate with the state's master plan in order to obtain and maximise their benefit. Further, since the role of the individual is downplayed and the interest of the individual is subsumed into the state and the whole society, a free and open market for atomic players is not a necessary condition. What matters is a system that maximises the capacity of the state as the key actor.

This sense of respect for authority is not as entirely rational an economic calculation as presented above. Rather, it derives from a strong socio-cultural background of Confucianism, as emphasised by the choice of the word 'patriarchal'. Briefly, this patriarchal ideology not only obligates the people to conform to the ruler's edicts but also reciprocally demands that the ruler love and care for its people. It thus renders its subjects likely to believe that policies made by their ruler(s) should and will be good to them, and that all they have to do is follow the direction of the ruler(s). Moreover, this sense of obedience and loyalty to the political ruler can easily be analogised and associated with another value that Confucianism appreciates highly: filial piety, that is, respect for one's parents and family elders.³⁷ The concept of '*jumuguan*' (父
母官; literally, parent-like officials) in Han societies is a good example. A government official is regarded and expected to act like a parent, and parents never harm their children; by the same token, children confidently obey their parents' orders and decisions. In sum, patriarchal capitalism embodies the idea of safely relying on the state, just like children relying on parents, to achieve the primary goal of the society—economic development.

The sources of modern patriarchal capitalism in Taiwan were, first of all, the developmentalist state of the Republic of China in the Republican period, when strong

³⁷ A similar argument can be found in Vanessa Fong's work on 'filial nationalism', a term she coins to refer to a type of nationalist sentiment that is analogous to her study participants' unconditional loyalty to their parents. See Vanessa Fong, 'Filial Nationalism among Chinese Teenagers with Global Identities', *American Ethnologist* 31, no. 4 (November 2004), 631–48.

government central control could be justified by the national mission of retaking the mainland back.³⁸ The agrarian industry was crucial to the administration, since the regime needed to feed millions of soldiers and their families who had retreated to Taiwan in the late 1940s.³⁹ Other than in this military capacity required by the historical situation, the state has always played a significant role in Taiwan's industrial development. In fact, the policy of import substitution industrialisation (ISI) in the 1950s, the export-oriented policy in the 1960s that precipitated the rise of small and medium enterprises (SMEs), industrial deepening in the 1970s, and industrial upgrading and diversification in the 1980s that allowed Taiwan's semiconductor industry to flourish were all suggested by technocrats and implemented with institutional force.⁴⁰ Such economic development spurred by state developmentalism was remarkably successful, and till now, to some Taiwanese people, economic development continued to justify the authoritarianism of the KMT.

In the dawn of the twenty first century, 'patriarchal capitalism' in Taiwan marches towards neoliberalism, which I have defined with two main characteristics: the priority placed on economic growth or increased profits that can be efficiently achieved by free trade; and the belief that government has the obligation to guarantee and secure a free market.⁴¹ The transition from one political ideology to the other seems effortless because the two share a major attribute: both are profit-oriented, with much emphasis on

³⁸ See, for example, Li Fu-chung, 'Weiquan tizhi xia de guomindang dangying qiye' ('The KMT's Party Enterprises in Its Authoritarian System'), *Bulletin of Academia Historica* 18, (December 2008), 189–220.

³⁹ Cheng Tun-jen, 'Transforming Taiwan's Economic Structure in the 20th Century,' *The China Quarterly*, 165 (March 2001), 27.

⁴⁰ *Ibid.*, 28.

⁴¹ David Harvey offers a more detailed definition: 'Neoliberalism is in the first instance a theory of political economic practices that proposes that human well-being can best be advanced by liberating individual entrepreneurial freedoms and skills within an institutional framework characterized by strong private property rights, free markets, and free trade. The role of the state is to create and preserve an institutional framework appropriate to such practices. The state has to guarantee, for example, the quality and integrity of money. It must also set up those military, defence, police, and legal structures and functions required to secure private property rights and to guarantee, by force if need be, the proper functioning of markets. Furthermore, if markets do not exist ... then they must be created, by state action if necessary. But beyond these tasks the state should not venture.' David Harvey, *A Brief History of Neoliberalism* (Oxford: Oxford University Press, 2005), 2.

the role of the state. But where the operation of patriarchal capitalism highly relies on state's plan, control and regulation, neoliberalism would emphasise the free market and reduce the function of the nation state to that of guaranteeing a secure playground for private enterprises to make profit and accumulate capital.

Despite the factual development of global neoliberalism in Taiwan, it is the earlier KMT ideology of 'patriarchal capitalism' that remains the core influence on the subjects discussed in this section. The key reason is that common people (as opposed to entrepreneurs) do not care about the real extent of the free market; they merely have a common-sense belief that free market and free trade are good things, while placing their trust entirely in government authority. Therefore, what guides such common people's political views is still the ideology of patriarchal capitalism: that is, their aspiration for economic development and their constant reliance on the nation state. And this is why I place these two ideologies in the same section for discussion.⁴²

In this section, I focus mainly on patriarchal capitalism, demonstrating how its ideology influences identity by influencing party affiliation. Moreover, I illustrate the transition from patriarchal capitalism to neoliberalism in Taiwanese society and how it relates to the political orientation of those subjects holding values consistent with patriarchal capitalism.

⁴² Yet, if so, what is the significance of taking neoliberalism on board in this discussion? The reason is that although it is the patriarchal capitalism shaping the mental modality of most of Taiwanese people who are eager for economic growth, this ideology has never been explicitly promoted or manifested by the KMT—the party that is believed to possess greater ability to achieve the goal than the DPP. In fact, the KMT has been using the discourse of neoliberalism (e.g., emphasizing its determination to promote the free market) to obscure the fact that its legitimacy rests partly on its supporters' belief in patriarchal capitalism. My analyses on this matter will only be sound when taking both of these ideologies into consideration.

Supporting the KMT Regardless of Its Misdeeds

The participants presented above, Wanling, Xinyi and Yueying, can also offer good examples of how the political ideology that I am calling patriarchal capitalism may affect political attitudes and identities.⁴³ Our starting point is a puzzle: Although all three, born in *benshengren* families, recall how the KMT ‘bullied’ *benshengren*, they still steadfastly support the long-ruling KMT party. Why? Apart from its image as a powerful authority to maintain social order, the KMT’s image as a capable economic leader also bolsters the affiliation of Wanling, Yueying and Xinyi’s to the party.

In our group interview Wanling and Xinyi say their family used to own much land in Taiwan, but the KMT government confiscated and distributed these holdings to tenants when implementing a series of land reforms in the 1950s.⁴⁴ Moreover, they also describe how atrocious the KMT military behaviour was in the 2-28 Incident of 1947. Wanling, who was a 10 year-old girl when the incident occurred, reports in the interview:

WANLING: The 228 Incident was very disturbing too. Those Chinese soldiers were beastly. Some country girls were raped.

Q: Really? Did that happen in Zhongli?

WANLING: Yes. We heard some names when working at my mother’s place. (Adults were talking.) I was only ten or so years old. I heard that somewhere some women were raped.

Yueying holds similar views about the 2-28 Incident:

YUEYING: The Japanese ruled Taiwan for fifty years, and they left in an orderly fashion; every soldier was standing straight, and their clothes were freshly pressed. When the mainlander soldiers came to Taiwan, they appeared defeated and lifeless. Can you imagine the striking contrast? The first impression of *waishengren* on Taiwanese people was very bad. Then came the 2-28 Incident, which

⁴³ I continue using Wanling et al as an example in order to further illustrate their political orientations in detail. This does not assume that the patriarchal capitalism ideology must always coincide with the conservative ideology. Although these two ideologies share some common characteristics (e.g., admiration for authority), they do not necessarily go together. Yet, the report of Wanling et al does show that an individual can possess multiple ideologies.

⁴⁴ They mentioned the ‘375 Rent Reduction’ and ‘Land to the Tiller’ policies in the interview.

resulted from a woman who smuggled cigarettes.⁴⁵ She shouted when policemen confiscated her cigarettes, and those who were discontent and resentful of *waishengren* came to help her. Then there came the conflict. [...] Chiang Kai-shek ordered the military to suppress and eliminate rioters. He was terrified by the communists, and he started to eliminate those who objected to KMT rule. During that period of suppression, 90% of the dead were Taiwanese, and 10% were *waishengren*. Shouldn't the anger of Taiwanese people go deeper?

However, being aware of these deeds of the KMT does not undermine Wanling, Xinyi, and Yueying's support for the party. On the contrary, they try to defend the KMT when describing these historical incidents. A key reason is that, for them, the KMT is the government that has brought them prosperity and an elevated standard of living:

XINYI: My mother's father might have been granted a small holding of land from the KMT, but the land of my grandfather was confiscated. For that reason, we should be the ones who resent the KMT, but instead many people who benefitted from the KMT hate it. It's very strange.

WANLING: Why should we hate the KMT? We have food to eat because of the KMT; we have pork and chicken to eat!

To Wanling, the KMT brought her a good life and improved her living standard. This picture emerges repeatedly during her interview. After recalling that before 1945 she could only eat chicken at the Lunar New Year's Eve feast, Wanling says the living standard of her family was improved after Chiang Kai-shek built two textile factories at Zhongli, where her brothers found employment. Xinyi adds to this:

XINYI: Basically, factories were moved from the Mainland, like Liuhe (六和), Yuansheng (元生), and Yongxing (雍興) textile factories. They were moved to Taiwan, and then Taiwanese people had jobs to do. [...]

WANLING: That was better. Therefore, I don't get why those people about my age who had suffered in poverty cannot think, why are they condemning the KMT? That is strange. I've experienced these things and know that it is because the KMT came to Taiwan, Taiwanese people then had food to eat. After they came, we can eat pork and chicken; sometimes the food is too much so we leave the food in the garbage or use it to feed livestock. In the past, we did not have pork and chicken to eat. We did

⁴⁵ The description by Wanling showed more sympathy to the lady. She said: 'At that time, Chinese soldiers just arrived. The woman was selling cigarettes, and some of them (Chinese soldiers) wanted to pick on her. Some witnesses then hit the Chinese soldiers with dustpans. The two sides then broke into fights. Some people were beaten to death.'

not even have sweet potatoes; not to mention leaving meat in the garbage! Why cannot people think nowadays? [...] We suffered under Japanese rule; the first few years after Taiwan's return to China were hard, too. And you just forget that! What are you doing? How can you forget that Chiang Ching-kuo and Chiang Kai-shek built factories for you to work, so that you could live happily and have nice new clothes?

This is one of the key reasons why Wanling and Xinyi support the KMT—the party led Taiwan to its current wealthy status and gave the Taiwanese people a better quality of life, and this plainly corresponds with the two principles of patriarchal capitalism: the priority of economic development, and the reliance on a capable leader, that is, the state, and the party. By applying these principles and focussing on the great achievements of the KMT, Wanling and Xinyi are thus able to tolerate their party's shameful deeds. And for the same reason, they would not think that carrying out political reforms and consolidating democracy are priorities for Taiwan, not to mention the risk of causing social conflict that they greatly loath and keenly avoid. The following portion of Yueying's interview again demonstrates these characteristics:

YUEYING: There was a great advantage to martial law: we fully dedicated ourselves to economic development. The only flaw was that we did not have our freedom of speech. I was working for a magazine around that time. [...] I was 20-something, and martial law had just been lifted. [...] A guy in our firm was a dissident to the KMT, and he told us about the 2-28 Incident. We were shocked to realise this kind of thing had happened in Taiwan. Then we started to question the political system led by a powerful leader: Is it right to have autocracy? But, when we looked back on all the major constructions in the 1960s and 1970s, [...] we realised we should not just overwhelmingly blame the government.

Q: So, did you not support the political and social reforms in the 1980s?

YUEYING: No, I did not. It can be said that we benefitted (from the KMT), and we are grateful. [...]

Q: But you just said that you would question autocracy ...

YUEYING: We looked forward to the lifting of the martial law, but we did not want to overthrow the KMT.

Clearly Yueying prioritises economic development over democracy and over freedom of speech. She believes that the KMT deserves people's gratitude—the system (e.g., martial law) can be changed, but the legitimacy and authority of the KMT should not be

challenged. Her preference for the patriarchal capitalist ideology contributes to her strong support for the KMT, and thus, by the mechanism of image association described above, the ideology also contributes to her inclination towards Chinese identity.

The Development of Neoliberalism and the Struggle of the DPP

In the late 1980s, the dominant ideology of patriarchal capitalism in Taiwan was gradually transformed to neoliberalism. This change must be related, first, to the society's widely held ideal of democracy, which challenged the traditional autocracy. Of course, the fact that even under martial law the government proclaimed the value of democracy contributed to this; and against the background of flourishing democratic values and increased experience, the society began to question seriously the authority of the government in the economic realm and, likewise, the efficiency, necessity, and legitimacy of a large state-planned economic sector. In this move towards democracy, the state was expected to deliver its power to the invisible hand—the market—to manage the economy.

The second factor is the nature of Taiwan's economic condition. It has been argued that as a small island lacking of natural resources and possessing a small domestic market, Taiwan cannot sustain its economic growth merely by the policy of ISI. It has to stimulate the development by embracing the global market.⁴⁶ Therefore, in the Cold War period, Taiwan's economy had been tightly integrated with US planning, causing Taiwan's export-led industrialisation of the 1960s and 1970s. The policy further achieved great success and contributed to the rise of a wealthy native Taiwanese capitalist class, particularly the entrepreneurs of SMEs. Taiwanese people who lived through this period are thus likely to have formed the strong impression that the development of Taiwan's

⁴⁶ Cheng Tun-jen, 'Transforming Taiwan's Economic Structure in the 20th Century' (2001), 29.

economy (and its middle class) was based on international trade. From this point of view, it can be boldly argued that the Taiwanese people's acceptance of neoliberalism has been facilitated by Taiwan's particular export-oriented economic structure. Sooner, the export-oriented SMEs in traditional sectors also put the government under pressure of facilitating international free trade. Facing rising labour costs, high land prices, more environmental regulation and currency appreciation, they spearheaded Taiwan's investment overseas without government approval. Although the state managed to assist their investments and expansions in South-East Asia, runaway SEMs placed more capital in China.⁴⁷ Moreover, the development of global neoliberalism has influenced Taiwan's politics as well.⁴⁸ Since the US has been Taiwan's political role model, it should come as no surprise that Taiwan's politics have gradually followed the path of neoliberalism ever since the administration of neoliberal US President Ronald Reagan in the 1980s.⁴⁹

Subject to the influence of these three factors, the development of neoliberalism in Taiwan became apparent during Lee Teng-hui's administration (1988–1999). For instance, Lee set up a special project team in the Executive Yuan to promote the further privatisation of many state-owned enterprises. Sixteen new private banks were established during 1991 and 1992, and twelve state-owned enterprises and twelve state-owned banks or insurance companies were privatised during his term.⁵⁰ Also, he carried out various financial reforms and made Taiwan an ideal market for international

⁴⁷ Ibid., 35.

⁴⁸ With regard to the emergence of neoliberalism, one element that David Harvey believes deserves specific attention is the crisis of capital accumulation in the 1970s, which posed an imminent threat to ruling elites and classes. Neoliberal policies were implemented in the late 1970s to 're-establish the conditions for capital accumulation and to restore the power of economic elites'. Harvey, *A Brief History of Neoliberalism*, 19.

⁴⁹ As in David Harvey's analysis, President Reagan can be regarded one of the leading figures of neoliberalism, along with Thatcher in Britain and Deng Xiaoping in China. See Harvey, *A Brief History of Neoliberalism*.

⁵⁰ See, for example: Zhang Yu-shan and Li Chun, 'Taiwan diqu gongying shiye minyinghua zhengce zhi huigu' ('Review of Taiwan's Policy on the Privatisation of Public Enterprises'), *Public Enterprise: Reform and Management* (Hong Kong: The Chinese University Press, 2002); and Mo Hui-fen, 'Gongying shiye minyinghua zhi shengsi' ('Reflection on the Privatisation of Public Enterprises'), *Shiyou laogong (Petroleum Labour)*, 352 (Taipei: Taiwan Petroleum Worker's Union's [TPWU], 2003): <http://www.tpwu.org.tw/periodical/356/1401.htm>.

investment.⁵¹ And since the establishment of the World Trade Organization (WTO) in 1995, Taiwan has been participating as an observer, even before it gained full membership in 2004.

The influence of neoliberalism continued when the DPP gained political power, occupying the presidency from 2000 to 2008. Not only the increasing demand both from international trade partners and from local SMEs drove the administration to facilitate Taiwan's integration into the global economic system, but also the party's desire to improve its image; that is, compared to the KMT, the DPP was seen as less competent to promote Taiwan's economic growth, and it was determined to change this. However, the DPP administration could not follow the programme of patriarchal capitalism launched by the old KMT regime, because the DPP had risen to power on a platform that condemned the KMT for its notorious authoritarianism and autocratic power, bolstered by its control of state enterprises. Consequently, the DPP decided to follow Lee's principles, adopting neoliberalism to spur the country's economic performance.

The DPP's adoption of a neoliberal strategy was apparent in many areas. Possibly the most notable manifestation was former president Chen Shiu-bian's oft-repeated slogan '*ping-jingji*' (拚經濟; literally, endeavour to grow the economy). This motto appeared often in Chen's speeches, and it showed not only that promoting economic growth was his foremost goal but also that his government was valiantly striving for it.⁵² More substantial evidence can be found in Chen's policies. For instance, he continued to privatise state-owned enterprises, bolstered the competitiveness of some small private banks by encouraging mutual acquisitions, and also directed national investment to

⁵¹ For instance, the limit on total foreign investment was lifted in 1995. See: Central Bank of the Republic of China (Taiwan), 'Waiguo zhuan ye tou zi jigou (QFII) zhidu zhi yanbian' ('The Change of Regulation of The Qualified Foreign Institutional Investor'), *Zhonghua-minguo 92 nian zhongyang-yinhang nianbao* (2003 *Central Bank Annual Report*) (2003), 130–133: <http://www.cbc.gov.tw/ct.asp?xItem=2473&ctNode=726&mp=1>

⁵² This repeated slogan of "ping-jingji" is usually quoted by Chen's opposers to mock his incompetence at improving Taiwan's economy. There is even a section in Chen's entry on Wikiquote listing his repeated claims of "ping-jingji." http://en.wikiquote.org/wiki/Chen_Shui-bian.

develop and benefit specific industries.⁵³ One of the observable results was Taiwan's increasing economic integration and cooperation with China.⁵⁴ Although Chen's administration was criticised for 'locking the country' by prohibiting Taiwanese entrepreneurs from investing in China and discouraging mutual trade between the two, economic interaction across the Strait nonetheless experienced very rapid growth in his term. From 2001 to 2008, the total amount of indirect trade and of investment both increased almost four times over, and the number of Taiwan visitors to the mainland increased by nearly 30%, while the number of mainland visitors to Taiwan doubled.⁵⁵ These figures do not suggest that Chen's administration set up obstacles to economic cooperation between Taiwan and China; on the contrary, they show its openness to mutual interaction.

But was the DPP's effort rewarded? More precisely, did the DPP prove that it could be a good leader for Taiwan's economic development? Ironically, it is difficult to judge this based on economic criteria. The average annual GDP growth during Chen's term (from 2000 to 2007) was 5.6%; during Lee's administration (from 1988 to 1999), it had been 8.23%. Thus, growth decreased, although this could have resulted from the global economic recession in the early 2000s and from the rise of China as the new world

⁵³ See: Leou Chia-feng, 'Financial Reform under the KMT and the DPP (1996–2004): Has the DPP Government Done a Better Job?', in *What Has Changed? Taiwan Before and After the Change in Ruling Parties*, edited by Dafydd Fell, Henning Klöter, and Chang Bi-yu (Wiesbaden: Harrassowitz, 2006), 107–126; Huang Tsung-hao, 'State-Business Relations of the Chen Shui-bian Presidency in Taiwan: Minority Government, Personal Network and Financial Reforms', *Taiwan Democracy Quarterly* 10, no. 3 (September 2013), 41–90; and Joseph Fan and Liu Wenchen, 'Financial Reform Experience: Taiwan's Five Largest Financial Holding Family Situation'. *Wantinnews*. January 24, 2014. <http://www.wantinnews.com/news-6292272-Financial-Reform-Experience:-Taiwan-39s-five-largest-financial-holding-family-situation.html>.

⁵⁴ Tung Chen-yuan, in 'The Evolution and Assessment of Cross-strait Economic Relations in the First Term of the Chen Shui-bian Administration', in *Presidential Politics in Taiwan: The Administration of Chen Shui-bian*, edited by Steven Goldstein and Julian Chang (Norwalk, CT: EastBridge, 2008), 229–257, claims: 'Chen proposed a policy of active management to replace the passive approach of 'no haste, be patient'. After he was elected president in March 2000, Chen adopted many measures to open up cross-Strait economic relations. Indeed, cross-Strait economic policy became a major initiative of the first Chen Shui-bian administration's China policy. Therefore, despite continuous political confrontation between Taiwan and China from 2000 to 2004, economic relations across the Taiwan Strait developed very rapidly' (ibid., 229).

⁵⁵ Statistics from Mainland Affairs Council, Republic of China (Taiwan): <http://www.mac.gov.tw/lp.asp?CtNode=5935&CtUnit=4153&BaseDSD=7&mp=3>. Data of 2008: <http://www.mac.gov.tw/public/Data/9731626971.pdf>. Data of 2001: <http://www.mac.gov.tw/public/Data/973190371.gif>.

factory. Nevertheless, judging from presidential election results both in 2008 and 2012, it seems that the DPP did not improve its image enough; the party was defeated by the KMT led by Ma Ying-jeou, whose election campaign dwelt on both Chen's corruption scandals and his incompetence at reviving economic growth.⁵⁶

Truly, the idea of a 'cross-Strait common market' (also known as 'one-China market') was one of the main themes of Ma's campaign. The policy was based on the first type of imagining of China noted in Wu Jieh-min's analysis.⁵⁷ This perspective on China sees only fortune and opportunities and believes China is the only promising future for Taiwan. The view believes that the mutual economic integration will eventually lead to a win-win situation, and also that Taiwan can exercise its strength to economically benefit China. More specifically, the belief is held that Taiwan's capital and management groups can not only contribute to China's industrialisation along its East coast but also help China to import and copy the modern management system of capitalism. Further, this idea also implies that the issues of responsible politics, democracy, and human rights can be left behind for economic development.⁵⁸ As Wu explains, this purely positive imagination about China is driven by the ideology of neoliberalism. Based on this policy goal for a common market, this positive imagining of economic integration between

⁵⁶ It was true that many factors may have caused the DPP's defeat in the presidential election in 2008—people were poorly satisfied with Chen's administration, there were Chen's corruption charges, etc. Yet, other concurrent events, such as Chen's continuous struggling to achieve economic growth, the accusation that Chen was locking the country, and the KMT's proposal for a cross-Strait common market, suggested a prevailing ideological trend of neoliberalism in the society.

⁵⁷ Wu Jieh-min, '2012, *yishang-bizheng de shoudu gongyan*' ('2012, the First Public Performance of Influencing Politics via Economics'), in *Disanzhong-zhongguo-xiangxiang* (*The Third Imagining of China*) (New Taipei City: Rive Gauche Publishing House, 2012), 107–112.

⁵⁸ The second imagining of China in Wu's analysis, on the contrary, only sees threat and risk. It believes Taiwan is nothing but a victim in its interaction with China. Wu thinks these two types of imaginings of China are biased and very ignorant of China, and he suggests the third way for Taiwan to view China is not only to recognise China's influential position in the global economy and international politics, but also to help it attend to its various social problems. Taiwan cannot merely integrate itself with China economically; it should also play an active role in supporting social reforms in China. If economic cooperation is something that cannot be avoided under the trend of globalisation, taking heed of the social problems such as inequality, human rights, and political systems is the true way to secure and benefit Taiwan in the future development. See Wu, '2012, *yishang-bizheng de shoudu gongyan*'.

China and Taiwan, and this neoliberal ideology, in 2010 the Cross-Straits Economic Cooperation Framework Agreement (ECFA) was signed.

The ideology of neoliberalism showed even greater influence on the presidential election of 2012. On the eve of the election, Cher Wang (王雪紅), chairwoman of the board of the HTC Corporation,⁵⁹ named as the richest person in Taiwan by *Forbes* in 2011,⁶⁰ made a public announcement that she was appreciative of the current peaceful status between China and Taiwan, which she believed was built on co-recognition of the “one China principle”. Wang claimed that her company had developed rapidly and benefitted greatly from this peaceful cross-Strait relationship over the KMT’s four years of administration; she appreciated the KMT’s cross-Strait policy and appealed to Taiwanese people to continue to support Ma’s government. Some commentators and researchers believe Wang’s revelation of her preference for the president significantly influenced the election result and assisted Ma in securing his administrative power. For instance, Lu Hsiu-lien (呂秀蓮), the former vice president under the DPP presidency, commented that Wang’s statement greatly wounded the DPP during the campaign.⁶¹ Further, judging from this incident, Wu Jieh-min considers the 2012 presidential election in Taiwan to be Beijing’s first exercise of its economic power to influence Taiwan’s politics.⁶² And it may be taken that China’s economic influence would not have been effective if the neoliberal ideology in Taiwanese society had not made its contribution.⁶³

⁵⁹ HTC is a famous (and the largest) Taiwanese manufacturer of smartphones and tablets. Since 2011, the company has released and marketed its smartphones with its own brand name. It was ranked as the 98th top brand by Interbrand on its Best Global Brands 2011 report.

⁶⁰ Russell Flannery, ‘Taiwan’s 40 Richest’. *Forbes*, May 25, 2011.
http://www.forbes.com/lists/2011/87/taiwan-billionaires-11_land.html.

⁶¹ Huang Hui-min, ‘Wang Xuehong tingma; Lu Xiulian shashang-lu’ (‘Cher Wang Supported Ma; Lu: This Harms the Green Camp’). *Central News Agency*. January 15, 2012.
<http://www.cna.com.tw/search/hydetailws.aspx?qid=201201140199>.

⁶² Wu Jieh-min, ‘2012, yishang-bizheng de shoudu gongyan’ (2012, the First Public Demonstration of Influencing Politics via Economics), in *The Third Imagining of China*, 107–112.

⁶³ It is worthy of noting the works of Michael Danielsen (2012), Frank Muyard (2012), and Wu Naiteh (2012), which designate that in general, the number of Taiwanese people who only claim Taiwanese identity has indeed increased since 2008. This fact seems to disprove the influence of the neoliberal ideology discussed in the text above. However, my point is that although the ideology seemed not ‘directly’

Trends of Ideology and Views on Taiwan's Future

A belief in patriarchal capitalism (or neoliberalism) can also affect the subject's views on Taiwan's future. In fact, participants who prioritise economic performance do not think the problem of Taiwan's current sovereignty is a crucial issue, believing that what should be focused on is Taiwan's economic development. Moreover, if they project that unification between Taiwan and China can benefit Taiwan economically, they are more inclined to support unification. Yueying's account demonstrates how she gives the economy priority over the issue of future unification or independence:

YUEYING: [...] Now other nations have started to recognise Taiwan, particularly for our remarkable OEM (Original Equipment Manufacturing) ability. Everything is inessential; only the economy matters! Taiwan stands out on the international stage because we have a very energetic and good economy. Our biggest flaw is that we cannot be like China enjoying a very rapid economic boost. They have a very strong domestic market of 1.3 billion population as a foundation for growth. It is a huge difference from our population of 23 million.

To Yueying, Taiwan's lack of international diplomatic recognition is not a big problem; unification or independence is not a key issue. What really matters is economic development and the resulting improvement of living standards. Her account also reveals her envy of China's incredible rate of economic growth, and this once again manifests the ideal she greatly admires: prodigious economic development carried out by a strong patriarch, the state.

This high value attached to economic growth also guides Xinyi's view on Taiwan's future. Although she thinks that Taiwan is currently an independent country, she also believes that Taiwan and China will definitely be united in the future. And the

influence on one's Chinese identity, its effect on one's impressions to China and to the political parties of Taiwan is still convincingly witnessed in my fieldwork. And these images can indeed influence some people's Chinese identity as I demonstrated in this chapter.

reason is that, while Taiwan will reach the limit of economic growth due to lack of natural resources, China will maintain its speedy pace of development and soon become a superpower, which Taiwan can and should rely on:

XINYI: [...] Our thinking is that the Chinese nation will be reunited sooner or later. Taiwan and China will be united as a nation in the future. But it may not happen in my lifetime.

Q: Why will Taiwan and China be united in the future?

XINYI: The mainland has been developing all the time! And Taiwan does not have many resources. That's why I always recycle used plastic bags; Taiwan does not have many resources.

Xinyi's account clearly shows her major concern: economic development. To further this goal, she can also accept the disappearance of her country, the ROC:

Q: If China merges with us, there will no longer be an ROC.

XINYI: As I said, if we are merged, we can think of a new name. What is important is it should be the KMT and the CPP cooperating and ruling the nation together. It'd better be a democratic electoral system, like what Taiwan has, though it is hard to tell about the future.

Q: So, it is okay if we don't use the name "ROC"?

XINYI: Don't use ROC, and don't use PRC. Use "China", or *zhonghua-minzu* (中華民族; the super-ethnic Chinese nation). They and we are of the super-ethnic Chinese nation.

This again precisely shows the logic of the patriarchal capitalism: the ultimate goal is economic development, and we rely on leaders to achieve this goal. Under this principle, democracy is not so important and can be given up (as Xinyi states, it would be 'better' to have this, rather than 'necessary'), and one's country or nation is not important; what matters is a more capable leader. Clearly, Xinyi's preference for unification between Taiwan and China is born neither out of Chinese nationalist sentiments nor of Chinese nationalist principles. Rather, she agrees with unification because she believes it will economically benefit Taiwan.

More participants of this type can be identified in my fieldwork research in Taiwan. For instance, one of the reasons for Kaiwei,⁶⁴ presented in Chapter 2, lists in support of Taiwan's unification with China is that it might benefit Taiwan's economy.⁶⁵ For that he can even accept the autocratic system in China, stating that autocracy could be advantageous to being efficient. Jane, a participant discussed in Chapter 3 and 4, also holds similar positions.⁶⁶ She opposes Taiwan independence and believes it will marginalise Taiwan and exclude it from the global economy. To Jane, China seems to be Taiwan's easiest, if not only, way to access (or to be integrated into) the global economy. Her idea of neoliberalism is tightly connected with China: If Taiwan wants to join the globalised economy, it has to pass through China. Her firm belief in neoliberalism thus generates her good image of China, and brings her to defend China's political system, just like Kaiwei:

JANE: I think the CCP is very corrupt, and I believe the leadership is trying to deal with this problem, but they can't. In the five thousand years of Chinese history, which ruler has not been corrupt?

Corruption: this is the way of Chinese people being governmental officials. There will be no officials if there is no corruption.

Q: So, it (corruption) is acceptable...?

JANE: I think that depends on their political achievements. Chinese people are just like a pan of sand. [...] For eight years under Chen's administration, and eight years under Lee's; more than sixteen years, we did not make any progress at all; we stagnated. However, when the KMT monopolised power, we had ten major constructions, twelve constructions, etc. Taiwan's economy was rapidly growing, and we were called one of the four little dragons in Asia. Then? Since we got the two-party system, have

⁶⁴ Kaiwei was born in 1987 in Taipei (*benshengren*) and is currently a postgraduate student in Tainan. He regards himself as a member of the supra-ethnic Chinese nationality and identifies himself as both Chinese and Taiwanese.

⁶⁵ Another reason for Kaiwei to support the unification is that by doing so, Taiwan can avoid oppression from foreign countries. Obviously, aside from the neoliberalist ideology, it is the East-West antagonistic discourse that bolsters Kaiwei's preference for unification. The East-West antagonistic discourse is discussed in Chapter 3.

⁶⁶ Briefly, Jane was a *waishengren* daughter born in the United State in 1977. She returned to Taiwan for her early education because her parents wish her to learn well Mandarin and Chinese culture. She went back to the US to earn a bachelor's degree. She is married to a *benshengren* and is now settled in Taipei City. She possesses the dual identity and identifies herself as both Chinese and Taiwanese. Her Chinese identity is formulated in the contrast of the idea of 'Westerners'; her case is mainly discussed in Chapter 3.

we had any progress? No! Has our status in the world been lifted? No! Therefore, I cannot really tell whether the CPP is good or bad, whether I would support it or not. I don't know.

One more time, Jane's account shows that democracy and the two-party political system are not her priority values. She accords a single-party system great trust and appreciation, and her key evaluative standard is either national construction or economic growth.

Anti-authoritarianism (Political Liberalism and Socialism)

My analysis has shown thus far how political ideologies may influence identity through individuals' images of political parties. Since there are people embracing Chinese identity due to their constant support for the KMT, it can be expected, conversely, that there are people feeling ambivalent about Chinese identity, or leaning towards Taiwanese identity, because of their opposition to that party. My research suggests two main ideologies consistently offering counter-discursive resources to resist the KMT's authoritarian rule. One is political liberalism,⁶⁷ and the other is socialist idealism.⁶⁸ On the one hand, dissenters in the early period of the Chiang regime on Taiwan, such as Lei Chen (雷震)⁶⁹

⁶⁷ Freedon (2003) describes the ideology of liberalism as follows: 'The supposition that human beings are rational; an insistence on liberty of thought and, within some limits, of action; a belief in human and social progress; the assumption that the individual is the prime social unit and a unique choice maker; the postulation of sociability and human benevolence as normal; an appeal to the general interest rather than to particular loyalties; and reservations about power unless it is constrained and made accountable—all these are the minimum liberal kit' (ibid: 81).

⁶⁸ Freedon (2003) also designated five characteristics of socialism: 'First, it sees the group as the basic social unit [...] For socialist, human beings are constituted by their relationships with their human and, at one remove, their non-human environments. A class, however, is an alienated group, isolated from the material and social goods required for full human development and expression. [...] Second, it has a passion for equality, for the removal of hierarchical distinctions, and for the redistribution of goods on the basis of human need. Third, it singles out work (also termed labour, creativity, productivity, and activity) as the fundamental constitutive feature of human nature, and accordingly the basic element around which social organization must be structured. Fourth, it cherishes an ideal of human welfare or flourishing based in the short run on the elimination of poverty and in the longer run on the free participation of all in the material and intellectual inheritance of humanity. Fifth, it fosters a belief in the promise held out by the historical process and the ability of human beings to direct that process to beneficial ends' (ibid: 83-84).

⁶⁹ Lei Chen was born in 1897 in Zhejiang Province in China. After he finished his early education in Japan, he went back to China and joined the Chinese Revolutionary Party, which was renamed the 'National People's Party', or Kuomintang (KMT) by Sun Yat-sen in 1919. Lei held many important positions in the party, such as chairman of party members in Nanking, head of the General Affairs Department in the Ministry of Education, member of the National Assembly, etc. He went to Taiwan in

and Yin Haiguang (殷海光)⁷⁰ can be considered heroic figures in the legacy of the liberal reformers. (Not to suggest that Lei and Yin would reject Chinese identity and embrace a Taiwanese one. These two are mentioned only as archetypal figures representing the main ideas/values of political liberalism in Taiwan.) The primary concerns of these reformers were civil and political rights; they appealed for freedom of speech, a functioning parliament, the right to organise political parties and hold general elections, and so forth. Many local native Taiwanese campaigners later invoked their names in the context of the limited elections allowed under martial law; while the KMT-ruled government defined demands for majority rule as the crime of sedition.

On the other hand, novelist Chen Yingzhen (陳映真)⁷¹ and exiled political dissident Su Beng (史明)⁷² can be categorised as holding socialist ideals. They were

1949 and worked as a consultant on national policy. He also edited and managed the magazine *Free China* with Hu Shi (胡適) and Yin Haiguang with government support. But in the mid 1950s, the magazine took a strong position against the KMT's autocracy; many articles were published not only criticizing the policies of the party but also demanding establishment of a real opposition party, which had been proscribed under martial law. Lei even managed to actualise this idea and called several meetings with native Taiwanese dissidents in 1960. These actions could not be tolerated by President Chiang Kai-shek; the magazine was soon forced to shut down and Lei was arrested and sentenced to 10 years in prison. He served the whole sentence and was released in 1970; he passed away in 1979 at the age of 82, but one of his last letters urged contemporary dissidents to form an opposition party; they eventually became the DPP.

⁷⁰ Yin Haiguang was born in 1919 in Hubei Province in China. He did postgraduate studies in philosophy at Tsinghua University in Beijing, and wrote editorials for Central Daily News and lectured at the University of Nanking. He went to Taiwan in 1949 and taught logic, Russell's philosophy, etc. at National Taiwan University. Yin was also a writer for *Free China*. After the journal was shut down, Yin's speech was also under strict censorship; many of his books were banned by the government. He died in 1969 in the age of 49.

⁷¹ Chen Yingzhen, a Taiwanese fiction writer, was born in 1937 in Miaoli County and received his education at Taipei. He graduated from college in 1961, having already produced his first novel. He was once a high school English teacher, a worker in a drug company, and a columnist for various magazines, including *wenxue-jikan* (文學季刊) and *xiachao-luntan* (夏潮論壇). Chen was arrested in 1968 and accused of organizing reading groups to discuss Marxism and Leninism and promoting communism. He served a seven-year prison sentence and was released in 1975. Chen joined the well-known debate on native literature (鄉土文學論戰) occurred in 1977. He stood for literary realism and suggested the purpose of contemporary literature is to explore the real situations of grassroots people, reproaching the criticisms that stigmatised literary realism as an attempt at secessionism or Taiwan independence. In fact, Chen had a great passion for China. He established the 'Alliance for the Reunification of China' (中國統一聯盟) and was its first chairman. He commuted from Taiwan to China and stayed in Beijing quite often from 1990 on. For his concern for grassroots people, as well as his passion for the re-unification, Chen is usually considered an exemplary figure of *zuotong* (left-wing unificationism).

⁷² Su Beng was born in 1918 at Taipei City. He went to college in Japan and learned much there about Marxism. After graduation, he headed to China and joined the Chinese Communist Party. However, the viciousness of CCP class struggle shocked Su, and he went back to Taiwan in 1949. With his opposition to the KMT's rule, Su plotted to assassinate Chiang Kai-shek in 1952. The plot was exposed

intellectuals familiar with socialist ideas utilised in Marxist theory, such as historical materialism, class struggle, base and superstructure, and so forth, which enjoyed a new popularity in late 1960s. They regarded the KMT as an authoritarian regime and a puppet of the United States. They believed in the political principles of socialism, if not communism, as not only the solution for Taiwanese society but also the light that everyone should follow for a promising and egalitarian future.⁷³

In despite of their different nuances—while liberalism emphasised the improvement of liberty and civil rights, socialism put weight on social equality and wealth redistribution—the common goal of these two ideologies in the 1970s and 1980s was to bring down the KMT dictatorship and establish a modern democratic parliamentary system. It can be said that the two groups influenced one another and both played significant roles in early Taiwanese political dissent: those pursuing democracy and political rights also cared about social inequities in Taiwanese society, and left-wing dissenters were also inspired by liberal predecessors. A good example is found in the autobiography of a Taiwanese left-wing advocate, Cheng Hung-sang (鄭鴻生),⁷⁴ in which he explicitly confesses that his development of socialist beliefs was influenced by early liberals such as Yin Haiguang. This intertwined relationship, as well as the common features of socialist and liberal factions, suggests it is appropriate to treat these ideologies

and Su fled for Japan, where he set up an underground organisation. In 1962, he published *Modern History of Taiwanese in 400 Years* in Japan. Two years later, he established the Association for Independent Taiwan (獨立台灣會). Su fervently supports Taiwan independence, as a Marxist national liberation movement. He is thus an exemplary figure of left-wing independence.

⁷³ These figures' influences on the social and political reforms in 1970s and 1980s Taiwan are indeed debatable: Lei Chen and Yin Haiguang were early intellectuals, and only in 1993 did Su Beng return to Taiwan and exercise his effect. Yet I mention them merely to illustrate the distinctive ideas and values of the two ideologies, liberalism and socialism, both of which served as the main ideological resources for dissidents fighting authoritarianism in Taiwan.

⁷⁴ Cheng Hung-sang was born in 1951 in Tainan and received his early education in Tainan City. He went to National Taiwan University in 1970 for his bachelor's degree, and during his studies, he participated in various activist events, such as the movement for defending the Diaoyu Islands, democracy protests, debates on nationalism, etc. He regards his political stance as leftist, and published a memoir in 2001 of his passionate youth in the 1970s. See: Cheng Hung-sang, *Qingchun zhibe: zhuiyi 1970 niandai Taiwan zuoyi qingnian de yiduan rubuo nianhua* (*Ballad of Young Days: In Search of the Passionate Time of a Taiwanese Left-wing Youth*, Taipei: Linking Publishing, 2001).

together under the concept of anti-authoritarianism when analysing the connection between people's identities and their images of Taiwan's political parties.

Nonetheless, liberalism arguably attracted more supporters than socialism and was the main ideology for the political reforms of the 1970s and 1980s. This can be adduced from several facts. Firstly, no socialist party of any considerable magnitude has been established or received support from Taiwanese people until the late 1980s. Further, although there are the Workers' Party (*gongdang*, 工黨) and Labor Party (*laodongdang*, 勞動黨) founded in 1987 and 1989 respectively, neither their scale nor mobilizing capacity can compete with that of the largest opposition party, the DPP, which should be regarded as a liberal party. Despite the fact that the DPP actively cooperated with unions and social groups and got involved in many labour and environmental movements and protests in the 1980s, the party's main goal was to carry out political reforms rather than wealth redistribution or promotion of workers' rights. For that matter, the DPP ended its close ties with many social and labour organisations after it came to power in 2000 (Sun 2012). Last but not least, many reformers who now claim to be left-wing socialists also especially stressed political liberation in the 1980s,⁷⁵ because they believed the KMT dictatorship was the root of all Taiwan's social problems, and that political transformation should effectively empower the subjugated people and solve all the problems at once.⁷⁶ In the 1980s and 1990s, the capacity of the aspiration for democracy to arouse people's enthusiasm and to mobilise supporters was even greater

⁷⁵ A figure just mentioned, Cheng Hung-sang, is a good example.

⁷⁶ For instance, Ho Ming-sho quotes Chen Wen-chien's (陳文茜) statement, which expresses her belief that political movement should be prioritized over other forms of movement, and only when the political reform is achieved, other types of reform can then succeed. See: Ho Ming-sho, 'Taiwan huanjing yundong de kaiduan: zhuanjia-xuezhe, dangwai, caogen (1980–1986)' ('The Beginnings of the Taiwanese Environmental Movement: Intellectuals, Political Opposition, and the Grassroots (1980–1986)'), *Taiwanese Sociology* 2 (December 2001), 102.

than that of Taiwanese nationalism, because there were in fact few people who would support Taiwan independence.⁷⁷

Several historical situations may explain the incapacity of socialist ideals to inspire the public in Taiwan. The first is the ‘dual war structure’ (*shuangzhan jiegou*; 雙戰結構), a concept that has been often used by left-wing socialists in Taiwan to explain Taiwan’s political and social development.⁷⁸ They argue that because of the tremendous influence of the two wars—the Chinese Civil War and the Cold War, there was little room for socialist ideology to develop in the society. Because in the two wars, the KMT, who dominated the island by authoritarianism for decades, was with the Western Bloc fighting the global communist regimes, the party made its great effort to stamp out any possible emergence of communist or socialist ideology.

By means of institutions such as martial law and totalitarian White Terror,⁷⁹ the KMT endeavoured to eradicate political dissent and to exclude common people from participation in politics. These measures effectively extinguished people’s inclination to resistance. People were frightened away from ideologies that did not conform to the government’s propaganda and discourses and, due to the anti-communist discourse of the Cold War era, socialism was necessarily one of the banned ideologies; in fact the merest show of social concern for the less privileged could be labelled as incipient sedition, that is, ‘propagandising for the communists’.

Further, the violent deprivation of political rights experienced by the Taiwanese people also compelled them to switch their aspirations and ambitions from the public

⁷⁷ According to the survey conducted by the Election Study Centre, in 1994, 11.1% of participants preferred Taiwan independence, 20% favoured Taiwan’s unification with China, and 48.3% preferred to maintain the *status quo*. (<http://esc.nccu.edu.tw/course/news.php?Sn=167#>)

⁷⁸ My interviewee, Dr Liu, whose case will be discussed in the sections below, used the idea of ‘dual war structure’ many times in the interview to explain why ethnic identity became an important issue in Taiwan, and why the conventional political division between the right and the left in most of the Western countries cannot develop in Taiwan.

⁷⁹ According to the Compensation Foundation for Injustice in Cases of Rebellion and Espionage Crimes under Martial Law, 7838 people were arrested and 808 were sentenced to death during the White Terror period (1947-1987). The statistical data can be reviewed on the foundation’s web site: <http://www.cf.org.tw/data.php>.

realm to the private.⁸⁰ In other words, people focussed on the improvement of their own standard of living rather than devoting themselves to politics and seeking to contribute to the well-being of the whole society. Just talking politics was inherently dangerous, not to mention caring about or getting involved in it. This situation also goes far in explaining the prevailing victory of the ideology of patriarchal capitalism in early post-World War II Taiwanese society: Pursuit of economic profit became the primary national activity; people identified themselves as capitalist, economic subjects chasing self-interest, rather than as organic members of the society who deserved social rights and security.

The third factor that diminished the influence of socialist ideals in Taiwanese society was the peculiar characteristics of the patriarchal capitalism ideology practised by the KMT government. As discussed, this government put great emphasis on the role of the state; its economic policy was centrally-planned, and it did undertake some land reforms to benefit smallholders. Although the KMT could by no means be mistaken for a leftist or even populist party, the legacy of land reform in its history—originating both from Sun Yat-sen and from US anti-insurgency tactics—did take some of the wind out of the sails of potential challenges from the left.

The fourth factor is the ethnic (provincial origin) conflict. As discussed in Chapter 3, the political, social, and cultural disproportionality in Taiwanese society were believed to be ethnic oriented. That is, the *waishengren* group was believed to possess more political, social and cultural resources than the *benshengren* group. Therefore, inequality in Taiwan was conventionally perceived as a conflict between ethnicities, or between autocratic (*waishengren*) rulers and common (*benshengren*) people. The appeal for class resistance thus did not gain much support in Taiwanese society because the appeal

⁸⁰ A good example is given in Cheng Hung-sang's work. As he describes, at that time in Taiwanese society, parents would not encourage their children to study the social science and humanity. One reason was that careers in these disciplines make little money, and the other reason was that it was indeed dangerous, not only for the person, but also for his/her whole family, to get involved in politics. See: Cheng, *Ballad of Young Days: In Search of the Passionate Time of a Taiwanese Left-wing Youth*.

for resistance against the KMT dictatorship or against the dominance of *waishengren* used up much of the momentum of resentment against rulers. In fact, not until three decades ago (1984) was the first non-governmental organisation for labour rights, ‘Taiwan Labour Legal Assistance’ (臺灣勞工法津支援會), now known as Taiwan Labour Front (臺灣勞工陣線), established, and labour protests of considerable scale were only seen at the end of martial law.

That said, socialist ideology nonetheless played a very important role in Taiwan’s political reforms in the 1980s. Its influences were twofold. The first one was conceptual, exemplified by the ‘debate on native literature’ (鄉土文學論戰) in 1977. This could be regarded as a debate over two literary paradigms: the modernist approach and the realist approach. In the context of Taiwan, modernist literature tended to give praise to the new Chinese nation projected by the KMT’s Chinese nationalism. Anti-communist literature (反共文學) was thus one of its important genres; another theme was depiction of the difficult lives of those forced to flee their homes in China. On the other hand, the realist approach believed that literature should serve the local people and should reflect uncompromisingly the real (and usually miserable) lives of native people at the grassroots level. This was why this approach was designated *xiangtu* (鄉土; literally, local or indigenous) literature. This literature was disparaged in a government-linked campaign as localism and even secessionism; it was also stigmatised as communist literature for its particular stress on the lives of farmers and labourers, such as miners. All the same, this socialist-leaning focus on compassion for the downtrodden drew people’s attention to the situation of those at the lowest levels of society, thus providing theoretical resources for those who sought to challenge the KMT regime on grounds of spurious legitimacy and unjust autocracy. The second important aspect of the socialist ideology for Taiwan was an empirical one. Labour movements rose up in the 1980s after Taiwan was

transformed to an industrial society, with many factories established and manufacturing labour crowding into the cities and urban margins. These labour movements drew people's attention to existing social problems, aroused their compassion for victims of modern development, and by doing so pressed the demand for political reforms.

Anti-authoritarianism and Identity

The way that the liberal and socialist ideologies influence people's Chinese/Taiwanese identity is similar to the way that conservatism and patriarchal capitalism operate. That is, the ideology first shapes one's images of certain political parties, and then affects his/her attitudes towards the discourses promoted by the parties, including Chinese and Taiwanese identities. This mechanism can be clearly observed in research subjects such as Chenli, one of my fieldwork participants discussed in Chapter Two. As noted before, Chenli holds dual identity: He identifies himself as both Chinese and Taiwanese. However, his dual identity comes with great conflict. On the one hand, he holds a strong passion for China and identifies himself as Chinese,⁸¹ although he also feels the idea is gradually becoming distant to him. On the other hand, he regards himself as Taiwanese; in the interview he used this term to designate himself as a person from Taiwan and to distinguish himself from people in China. But he also hesitates about this idea, because it is typically used by the DPP for political mobilisation. In other words, there exist forces of both attraction and repulsion simultaneously pulling Chenli towards and away from Chinese identity and Taiwanese identity.

⁸¹ Chenli says that, particularly in the past, he felt strongly that he was part of the Chinese people and hoped the ROC government in Taiwan could re-take China one day. As a *waishengren*, he believes that he will eventually go back to China, his mother country. In this regard, he possesses imagined nostalgia towards China. Refer to Chapter 3 for more detailed discussion about imagined nostalgia, and to Chapter 2 for Chenli's identity pattern.

Since Chenli grew up in a *waishengren* family and was educated with the KMT's Chinese nationalist ideology, it is not surprising that he possesses a certain degree of Chinese nationalist sentiments as well Chinese identity (as indeed he does). Nevertheless, how should we account for Chenli's Taiwanese identity? How was his affinity to Taiwanese identity generated? One of the key reasons, as I argue, lies in his liberal aspirations or, more precisely, his anti-authoritarian sentiments, which brought about his opposition to the KMT dictatorship as well as his favourable images of the DPP. His early impressions of the two parties can be seen here:

CHENLI: When the DPP was established, I had very good impressions of it.

Q: Really?

CHENLI: Right. And I had very bad impressions of the KMT.

Q: How?

CHENLI: I thought they (the DPP) were refreshing and asking for reforms. We just hated to see some deeds of the KMT. I thought what they (the DPP) said was right, and sometimes I voted for the DPP. [...]

Q: And why did you dislike the KMT at that time?

CHENLI: I believed what they (the DPP) said made sense. They said how the KMT was rotten and corrupt, and I thought that was really true. Although I was a member of the KMT, I had no contact at all with them.

The report explicitly shows the key element creating Chenli's early impressions of the KMT and the DPP was the anti-authoritarian liberal ideology—the KMT dictatorship is corrupt and rotten, while the DPP is refreshing and progressive; it is important therefore to have a sound democratic political party system in place to overturn the ruling party, the KMT. The valid challenge carried out by the 1980s reformists against the KMT prompted Chenli to rethink the KMT's discourses and opened the opportunity for Chenli to accept the appeals made by the reformists.

Nevertheless, Chenli does not wholeheartedly embrace Taiwanese identity. His hesitation once again shows the significance of one's impressions of a political party.

More precisely, Chenli's hesitation about Taiwanese identity results from his later poor impressions of the DPP.

Q: So, you said your image of the DPP deteriorated later?

CHENLI: Yes, my image (of the DPP) became worse. It seemed ... sometimes their protests on the street went too far. And, they always accused others of 'not loving Taiwan'. They did that quite often. And I would think, why did it turn into this?

Q: 'Loving Taiwan' became a ...

CHENLI: Yes! It seemed to be a moral obligation, demanding that you love Taiwan and prioritise Taiwan. But did they really love Taiwan? No! They did a lot of bullshit, right? They were so pretentious. They advocated and demanded a high standard of ethics, but they did a lot of low things. But some DPP members are good; they are not bad. But these good DPP members were labelled the "11 gang" by other party members, you know? I think they were labelled the "11 gang" because they spoke the truth, and they did not put the party's interest ahead of justice. Because their speech and deeds impaired the party's interest, they were attacked by other members. I don't think a party should act that way. ...

There were three reasons why Chenli turned his back on the DPP: he felt and believed that, first, the party manipulated Taiwanese nationalist sentiments; second, the party came to care only for its own political interests; and third, the party began to exclude good members who were willing to offer constructive advice. Generally, the DPP disappoints Chenli for its failure to act as a good and responsible political party in the modern parliamentary system. His disappointment has made him suspicious of the discourses promoted by the DPP, particularly Taiwanese nationalism, since Chenli believes the DPP is manipulating the ideology for political gains. These negative impressions then hindered Chenli from fully embracing Taiwanese identity.

Nationalism

Principles of Nationalism

Compared to the highly contested concept of ‘nation’, the features of ‘nationalism’ make it seem far more accessible to its contemporary study. If the task of defining the idea of ‘nation’ is put aside and it is simply deemed to be a particular modern form of community, three major characteristics of nationalism can then be found described in most of the literature: (1) a consciousness (recognition) of the community (nation), (2) a passionate attachment (loyalty or sense of belongingness) to the community, and (3) an aspiration for the community to seize its modern political sovereignty (exercise its sovereignty as a modern state).⁸² By this definition, Chinese nationalism in this thesis thus refers to the passionate attachment (the sense of belonging) to the nation named

⁸² For instance, the report produced by a study group of the Royal Institute of International Affairs in 1939 maintains that nationalism was used generally to refer to ‘a consciousness, on the part of individuals or groups, of membership in a nation, or ... a desire to forward the strength, liberty, or prosperity of a nation, whether one’s own or another’ (RIIA 1939: xviii). Kohn (1955) defines nationalism as ‘a state of mind, in which the supreme loyalty of the individual is felt to be due the nation-state. A deep attachment to one’s native soil, to local traditions and to established territorial authority has existed in varying strength throughout history. ... Only very recently has it been demanded that each nationality should form a state, its own state, and that the state should include the whole nationality’ (ibid: 9). Alter (1989) observes that the common structural components of nationalism includes ‘consciousness of the uniqueness or peculiarity of a group of people, particularly with respect to their ethnic, linguistic or religious homogeneity; emphasizing of shared socio-cultural attitudes and historical memories; a sense of common mission; disrespect for and animosity toward other peoples’ (ibid: 7). Greenfeld (1992) believes the ‘specificity of nationalism, that which distinguishes nationality from other types of identity, derives from the fact that nationalism locates the source of individual identity within a “people”, which is seen as the bearer of sovereignty, the central object of loyalty, and the basis of collective solidarity’ (ibid: 3). Erikson (2002) conceives that ‘nationalism stresses the cultural similarity of its adherents and, by implications, it draws boundaries vis-à-vis others, who thereby become outsiders. The distinguishing mark of nationalism is by definition its relationship to the state’ (ibid: 7). Connor’s nationalism theory also puts emphasis on its feature of ‘loyalty’ to a specific group (Conversi 2004: 2). Gellner’s (1983) famous definition of nationalism—‘primarily a political principle, which holds that the political and the national unit should be congruent’—was adopted by many researchers, such as Hobsbawm (1992) and Breuille (1994). It then can be seen that aside from the dissension among these theorists on the conceptualisation of ‘nation’, their views on nationalism generally cover the three characteristics (although they use different terms to describe them): (1) consciousness of a peculiar group, (2) emotional attachment to the group (described with words such as loyalty, adherent, etc.), and (3) aspiration for the group’s absolute sovereignty (described with words such as authority, collective solidarity, and Gellner’s “prime political principle”). My research does not intend to engage in theoretical debates on the definition of ‘nation’. Rather, by focusing on the concept of nationalism, it aims to use these basic features to identify and illustrate the nationalist ideologies in Taiwan.

‘China’, accompanied by the desire for the nation to exercise modern sovereignty internally in its territory and externally in its interaction towards other nations, no matter how this ‘Chinese nation’ is defined. The same applies to Taiwanese nationalism.

The ideology of nationalism can be categorised into Ball and Dagger’s notion of ‘liberation ideology’ and is a type of identity politics.⁸³ This type of ideology first classifies people with certain criteria, then offers a particular ethical narrative according to that classification, and demands its subjects to take specific action. Ethical narratives can be variously produced for any nationalism. For instance, Chinese nationalism in Taiwan may be supported by the discourse of East-West antagonism and that of anti-DPP sentiment, while Taiwanese nationalism may be comprised of discourses of China-Taiwan antagonism, anti-*waishengren*, or anti-KMT sentiment. The functions of these discourses are explicitly illustrated in Chapter 3 with empirical cases.

The Clash between Socialism and Nationalism:

Left-wing Unificationists in Taiwan

Since the operation of Chinese and Taiwanese nationalism, as a type of liberation ideology, have been explained in the previous chapter where the various ethical narratives are illustrated, this section discusses a particular ideological faction called ‘*zuotong*’ (左統; literally, left-wing unificationist) in order to further demonstrate the mechanism by which ideology affects identity. The concept of *zuotong* refers to a political stance that supports simultaneously left-wing ideology and Taiwan’s unification with China. This concept may be envisioned as placed on analytical coordinates drawn in two dimensions by two axes: (1) the ideological stands of right-wing versus left-wing and (2)

⁸³ See Ball and Richard Dagger, *Ideals and Ideologies: A Reader*. Further, nationalism can be a concept of identity and also a type of politics, since it offers a specific framework by which to view the world and society and calls on its subjects to take specific attitudes and actions. See also footnote 22.

the preferences of unification or independence. By these conceptual coordinates, there can be four political ideologies in Taiwan: left-wing unificationists (*zuotong*), left-wing independence advocates (*zuodu*; 左獨), right-wing unificationists (*yotong*; 右統), and right-wing independence advocates (*yodu*; 右獨). However, these analytical coordinates offer only an incomplete explanatory framework. The main problem is that, since most of Taiwanese people prefer maintaining the *status quo*,⁸⁴ an analytical framework based on the dualism of unification and independence would apparently fail to cover the majority of people in the society. Therefore, this analytical coordinate should be regarded as an object of analysis rather than a tool of analysis.

The concept of left-wing unificationism and the coordinate system on which it is based are of great significance in this research in the following aspects. First, the left-wing unificationist idea is a classic example of interaction between discourses, because it is a product of the clash of the two ideologies in Taiwan—socialism and nationalism. The latter apparently dominates, because nationalist ideologies cleanly divide the socialist camp in Taiwan into two groups: one supporting unification and the other supporting independence. This therefore once again attests to the argument discussed in the previous section: Socialism in Taiwan was not as popular as liberalism and nationalism in the 1980s. The socialist ideology seemed by itself unable to attract as much attention and support as liberalism and nationalism did, and its development was hence significantly influenced by these other ideologies. Finally, the idea of left-wing unificationism manifests the important role of political ideologies in identity formation, because it reveals that neither Chinese nationalism nor Taiwanese nationalism possesses the determinative power to shape people's Chinese and Taiwanese identities in Taiwan. Other political ideologies exercise their influences and cause enormous identity diversity.

⁸⁴ According to the survey conducted by the Election Studies Centre at Chengchi National University in 2013, 59.1% of participants wish to maintain the status quo. Data can be retrieved at its website: <http://esc.nccu.edu.tw/course/news.php?class=203>.

Dr Liu: A Left-wing Unificationist in Taiwan

The case of Dr Liu, who labels himself as *zuotong*, not only sheds light on the powerful influence of (Chinese) nationalism but also illustrates a subtle type of interaction between socialist and nationalist ideologies. To adequately understand Dr Liu's political stand, it is worth referring to Chen Ming-zhong's analysis on the idea of left-wing.⁸⁵ Chen, a self-identified left-wing unificationist, classifies the left-wingers in Taiwan into three types according to the era of their development: (1) Neo-democratic left (新民主主義左派), that is, those who witnessed Japanese discrimination against Taiwanese people in the period of Japanese rule and who formed their socialist ideology very early.⁸⁶ (2) Cultural Revolution-period leftists (文革左派), that is, those prompted by the movement to recover the Diaoyutai Islands in the 1970s and influenced by the Cultural Revolution in China. (3) The study-abroad left (留洋左派), that is, those who learned socialist ideology when they studied abroad (typically during the 1970s and 1980s). Despite their different life experiences, they all loathed and opposed the KMT dictatorship and sought an equitable, socialist system.

⁸⁵ Chen Ming-zhong (陳明忠) labels himself a left-wing unificationist. He was born in 1929 in Kaohsiung. In an interview conducted by Lu Zheng-hui and Chen Yi-zhong (2008), he stated that he was discriminated against by Japanese classmates in his early education and thus hated Japanese. He evaded his military duty under Japanese rule and got arrested. During the 2-28 Incident, he joined the army of Xie Xue-hung (謝雪紅), a founding member of the Taiwanese Communist Party, and fought against the KMT's regime. Chen was arrested in 1950 on the charge of rebellion and served a 10-year prison sentence. He was released in 1970 and worked in a drug company at Taipei. In 1976 Chen was once jailed for supposedly spying for China, but what he had done was help the election campaign of Huang Hsin-chieh (黃信介), who was later the third chairman of the DPP. Chen was released in 1987, and has been helping organisations like the 'Alliance for the Reunification of China' (中國統一聯盟). See Lu, Zheng-hui and Yi-zhong Chen, 'Yige taiwanren de zuotong zhi lu: Chen Ming-zhong xiansheng fangtanlu' ('A Taiwanese person's road to left-wing unificationism: Interview with Mr Chen Ming-zhong'), *Si Xiang (Reflection)* 9 (May 2008), 71–108.

⁸⁶ In Chen's analysis, there were two types of leftist activist at that time: one who acquired socialist ideas very early in the period of Japanese rule; and the other who turned to the socialist camp after 228 Incident. Chen claims to be the first type.

According to Chen's classification, Dr Liu best fits the pattern of a 'study-abroad' leftist. He was born in a *benshengren* family in 1950, one year after the KMT government retreated to Taiwan. His father was a public servant in Hualian County. Liu spent his childhood in the county, and soon went to Taipei and Kaohsiung to study medicine. In 1981, he went to a university in Japan to study physiology. According to him, he first learned about Marxism and socialism during his stay in this foreign country. In addition to his career as a physician with a clinic in Taipei, Liu has also published several left-wing books and articles written from a socialist perspective.

As a left-wing unificationist, Dr Liu holds two values deeply as the basis of his political positions: socialism and Chinese nationalism. His passionate support for socialism, on the one hand, can be clearly observed throughout his interview. For instance, he believes Taiwan's democratisation in the 1980s was a result of class struggle in Taiwan, brought to the forefront by rapid and large capital accumulation since the 1960s. And he further connects these outcomes with the capitalist development of the US:

LIU: The principle of economic policy of Taiwan in the 1960s was 'export orientation'. [...] Without the US market, Taiwan's export orientation and its economic development would have been impossible. Why were the 1960s a turning point? This was quite relevant to the emergence of globalisation at that time, which constructed a new generation of bourgeoisie. [...] Soon in the late 1970s and the early 1980s, this new bourgeoisie of Taiwan became more mature. It was important because that was the core element of the democratic movement. Taiwan's democratic movement was the Westernised, political, bourgeois movement; the American-style movement. The bourgeoisie was trying to seize power.

In addition to his explanation of the emergence of the Taiwanese bourgeoisie class, Liu believes leftist theories also contributed to the 1980s political reforms by offering abundant discursive resources. He gives the debate on native literature in the 1970s as an example, saying that it was indeed a movement of literary realism, and literary realism could be regarded as a form of left-wing literature. Moreover, after

martial law was lifted, not only did many exiled activists and intellectuals come back to Taiwan, but also many imprisoned political dissidents were released in the 1970s and 1980s. All of them greatly contributed to the discourse on political reform and significantly influenced the social-political movement at that time through their personal participation.

Liu's socialist stance led to his opposition and active resistance to the KMT regime in the 1980s. He recalled:

LIU: ... The KMT had held its superior power for decades. In the 1970s, it ruled and bullied the left wing and even the unificationists in Taiwan. The regime tried to control our minds and censored our speech. [...] The common enemy we aimed to overthrow was the KMT regime.

His socialist ideology also contributed to his early favourable impression of China, because he regarded China as his socialist 'motherland'. As he explains, not until the June Fourth 1989 Incident, otherwise known as the Tiananmen Square incident, when he witnessed the CPP government brutally suppressing the student protest, was his fervent admiration for the CCP really challenged:

LIU: ... Because of the June Fourth Incident, the image of the CPP was indeed devastated for everyone (i.e., left-wing advocates)—not only in Taiwan but also in the whole world.

Despite this disappointment, Dr Liu still preserves his passion for China, and his strong Chinese nationalist sentiment can also be observed throughout his interview. His view on Tibetan independence is a good example. Contrary to the conventional Marxist emphasis on the right to democratic self-determination, Liu opposes Tibetan independence.

LIU: China is a country of multi-ethnicities. This is important. This ethnic multiplicity was gradually formed in the Ming and Qing Dynasties. Different dynasties had different ethnic issues. So, Tibetan independence and Xinjiang independence ... there are two problems in this issue. One is internal.

For instance, the democratic policies of China, of the CPP, in my opinion, are progressive. However there is a huge gap between policy and execution. Bureaucratism is a big problem in China. [...] Since the Chinese economic reforms of the 1970s, gaps among different regions and different ethnicities have been exacerbated. [...] Reform has meant the development of capitalism and commercialisation, and during this process, regional and ethnic conflicts have been created due to uneven development. This is why China plans to transfer the focus of economic development to outlying regions; it aims to diminish the development gap among the regions. However, ethnic conflict cannot be equated with economic conflict; ethnic conflict is very relevant to the work of (political) ideology, just as is true in Taiwan. Yet of course, the problem of ethnicity, the conflict of ethnicity, and the development of ethnic consciousness basically result from economic inequality.

Q: Some might compare Taiwan to Tibet, saying that the Taiwanese and Chinese share very similar ethnicity and culture, but Tibetans have very different language, religion, and culture from the Han. From this point of view, such people would not support Taiwan independence but tend to support Tibetan independence. Do you think this viewpoint correctly reflects the concept of national self-determination?

LIU: I don't think there is an absolute standard by which to judge this. For me, in terms of the issue of Tibetan independence, the key question is, who supports and develops it? What I put much emphasis on is anti-imperialism. This is really important. [...] But what I refer to is actually a new type of imperialism, which is implemented in the process of globalisation or by the ideology of neoliberalism. It is not like the old imperialism which invaded you with aircrafts and cannons. Rather, it exercises its influence with monopoly capital, globalised monopoly capital that utilises the great power of the nation state. Right, the interference of imperialism, this is what I judge the issue from.

Q: I see.

LIU: Another point is that a strong and self-independent China, in a broad sense, is still very important. An independent and strong China is necessary. However, it has to be socialist. This (the relationship between my aspiration for a strong Chinese nation and my appeal for socialism) is very dialectical. [...] Therefore, no matter whether Taiwanese independence or Tibetan independence, the interference of Western imperialism must be the most crucial element in its momentum. I believe so. In fact, if Tibet seeks its independence, just like Taiwan independence, it has no other choice but revolution. Like Mao Zedong, like the CPP; the CPP overthrew Chiang Kai-shek's regime by revolution. This is independence. Kosovo is another example. Yugoslavia; what a sad story. There is an example of how Western force interfered.

Q: It seems that there are two main themes in your whole idea: one is anti-imperialism; the other is the sentiment for an independent Chinese nation.

LIU: Not quite ... but yes, such sentiment is one aspect, but it is our imagination for the whole world. Only an independent and a strong nation can fight against imperialism. The history of China is indeed a history of being bullied. [...] If you want to fight against imperialism, the question is, what is the opposite of imperialism?

Several aspects of his interview indicate Dr Liu's passionate Chinese nationalism. First, his viewpoint supports a supra-ethnic Chinese nation; more specifically, he ignores the histories of ethnic minorities and integrates them into a linear, single, orthodox Chinese history. Second, Liu shows his fervent nationalist aspiration for an autonomous and strong China. To him, China has not been independent and strong enough; the nation is still controlled and suppressed from a distance by the Western imperialists or, more precisely, by the ideologies of capitalism and neoliberalism. And it is urgent in his view to have a powerful Chinese nation to fight against the new imperialism. Third, and as a result, Liu hopes for a unified Chinese nation and opposes the independence of Tibet, Taiwan, or any region or any ethnic group. He is thus another perfect example of the subject of the East-West antagonistic narrative discussed in Chapter 3.

When (Chinese) Nationalism Transcends Socialism

Liu's accounts clearly show two main values: one is Chinese nationalism, and the other is socialist ideology. Between these two ideologies, Liu prioritises the former. This is manifested in two ways. One is Liu's attitude to Tibetan independence, and the other is his view on Taiwan independence.

First, as shown by his account of Tibetan issues, Liu recognises that there exist many problems in Tibet under Beijing's rule, and he believes it is a malfunction of the modern state system (that is, the modern bureaucratism of China) that causes the inequality between Tibetan and other Chinese people. In other words, he conceives that it is globalisation and the development of neoliberalism that are causing Tibet's problem, and it is China, the Han ethnicity, that has brought this problem into Tibet and changed the situation there. Nevertheless, Liu refuses to adopt the solution that seems capable of directly resolving the problem: He hesitates to recognise, if not firmly rejects, the right of

Tibetans to resist the autocratic Beijing government, thus disregarding their right to self-determination. And the reason for his opposition is his perception of Western imperialist involvement in Tibet's pursuit of independence, although he seems unable to offer solid evidence to support this accusation. Here we can once again see how strongly the discourse of East-West antagonism influences political views, as presented in the previous chapter. His account thus clearly shows that, in his mind, the invasion of Chinese neoliberalism (Chinese capitalism) is more tolerable than the invasion of Western, imperialist-style neoliberalism (Western capitalism); moreover, the integrity of the Chinese nation is more important than the Tibetan people's right to self-determination. Confronting the principles of Chinese nationalism, Liu's socialist values can be adjusted and compromised.

The extent to which Chinese nationalism transcends socialism in Liu's view can also be observed in his attitude towards Taiwan's future. Briefly, he supports Taiwan's unification with China, but cannot accept unification under the current conditions:

Liu: The [cross-Strait] integration is an objective trend, a trend carried forward by capitalist logic. Do you know? It's not [nationalist] ideology that is breaking through the tension between the two sides; it is capitalist power. Therefore, we should maintain a critical stance. I am a unificationist, but as a unificationist I don't want this kind of integration. This integration brings so many problems. Towards the emerging new interest groups in China, or towards their party and their country, we must maintain a critical stance.

Liu does not support Taiwan's unification with China in the way it seems to be happening. He believes it is the logic of capitalism (neoliberalism and the force of globalisation) that currently promotes integration between the two sides. It is the upper class, not the oppressed, of both sides that benefit from this integration, and Liu would not like to see this happen.

That said, Liu still aspires to a future in which Taiwan and China can be united, and due to this aspiration, he strongly opposes Taiwan's independence. This view can be

also explained another way. Although Liu thinks there are many problems in China under the CPP's rule (that is, under its developing neoliberal ideology, as he states in the interview), he still dreams of future unification between Taiwan and China, and a new autonomous and strong Chinese nation projected for the future. In other words, he hopes for an integrated socialist Chinese nation rather than an independent, social-democratic Taiwan. This reveals that Liu's Chinese nationalism transcends his socialist values. Or, at least, in terms of Taiwan's future and his own identity, he puts more weight on Chinese nationalism than socialism.

Conclusion: Ideology and Identity

This chapter illustrates how political values, which decide what key social problems that society should attend and what political programme society should take, influence one's identity formation. The chapter depicts how the four major political ideologies in Taiwan (that is, conservatism, patriarchal capitalism, anti-authoritarianism, and nationalism) can affect the Chinese and Taiwanese identities among Taiwanese people. The main argument is that aside from nationalism ideologies, which are based on the operation of identity classification,⁸⁷ other forms of ideology exert their influence through a third party—usually through political parties. More precisely, an ideology links a person to a political party, such as the KMT or DPP, mediated by his/her constructed images of the party, and then this party's political stance influences the person's view on Chinese/Taiwanese identity.

The indirect workings of political ideology thus explain why its influence on Chinese and Taiwanese identities appears less potent compared to that of other factors,

⁸⁷ Dr Liu is one example of such a case. His identity pattern is shaped by two discourses—socialism and the East-West antagonistic element in Chinese nationalism.

such as moral dualistic narrative (discussed in Chapter 3) or cultural hierarchy (discussed in Chapter 4). The political values conveyed by the concerned political ideologies refer to how a person views and explains the world, and expects and wishes it to be, and these values do not directly attach to the two generic labels, 'Chinese' and 'Taiwanese'. However, the targeted objects in the operations of ethical narratives and cultural hierarchy are the concepts of Chinese and Taiwanese themselves: the moral values and socio-cultural values constructed in these types of discourses are directly endowed into these two generic labels. For this reason, the influence of ethical narratives and cultural hierarchy on the formation of Chinese and Taiwanese identities can be more powerful than that of political ideologies. Truly, many participants of this type (i.e., who give political ideologies more weight than national identity) do not think Chinese and Taiwanese identities are very important issues in Taiwan. They wish the government and political parties in Taiwan can put more heed on the matters about which they care much, such as economic growth or social justice, rather than issue of identity.

The analysis also reveals how multiple ideologies can act simultaneously on a person. Sometimes, a single ideology may occupy the hegemonic position and exert the primary influence. Sometimes, different ideologies may become salient when the subject is involved in different topics or in different contexts. For example, it can be observed that both socialism and Chinese nationalism construct Dr Liu's worldview, and it is his Chinese nationalism that mainly shapes his Chinese identity and guides his opinions on Tibetan and Taiwan independence. However, when mentioning China's social problems caused during its economic development, Dr Liu reveals his socialist concerns. This cooperation, interaction, and integration between ideologies suggest that ideologies, like discourses, are far from being atomic, rigid, and unchangeable. Not only can ideologies (as well as identities) share similar values and ideas, but people are also free to shift between ideologies (and identities). Ideology's characteristics of openness and fluidity

thus endow the ideological subject with political power and free will in the sense that subjects have the option to select a specific ideology (identity) or not.

Conclusion

Identity: Discursive Generic Concept

The core of my research is to discover how Chinese/Taiwanese identities exist in contemporary Taiwanese society, that is, what various discourses are associated with and influencing the formation of the identities, and how people in Taiwan understand and engage with these identities. What conclusions may we draw thus far? On the most basic level, we know that Chinese and Taiwanese identities are generic classifications that are constructed and obtained in Taiwanese society. They are discourses, symbols, discursive sets, or packets of meanings that are constructed to explain and interpret reality.

These identities thus possess many of the more general attributes of discourse, one of which is that their meanings are multiple and fluid. Taking the idea of ‘Chinese’ in Taiwanese society for example, the term can refer exclusively to the *waishengren* ethnic group in Taiwan, the people of the People’s Republic of China (PRC), the people of the Republic of China (ROC), all the ethnic groups in both China and Taiwan, all people with yellow skin and black eyes, people who share elements of Chinese culture, or even to all the peoples of Asia. As for Taiwanese identity in Taiwan, it can refer to the *benshengren* ethnic group or to people who were born and grew up in Taiwan. Some people equate being Taiwanese with the ability to speak fluent Taiwanese (*Taiyu*). People in Taiwan usually recognise these multiple meanings, and they often draw attention to one or two specific meanings when asked to explain these generic concepts, or when asked to explain their support for a specific identity. A claimed identity (and its salient meanings) usually lasts for long, but in some circumstances people would strategically adopt different meanings of the identity according to specific contexts.

How can an identity acquire multiple meanings? The mechanism also relates to its discursive characteristic. Identities as discourses can interact with other discourses and symbols. They can be articulated with each other to form new discourses and to generate new meanings. Sometimes these (newly formed) discourses may, in turn, influence the formation of other meanings and discourses. For instance, Chinese/Taiwanese identity might be articulated through various ethical narratives in Taiwanese society, including the narrative of East-West antagonism, the anti-KMT/*waishengren* discourse, and the discourse of China-Taiwan antagonism. In these articulations, the concepts of Chinese and Taiwanese are endowed with various meanings mentioned above.

Viewing identity as discourse also explains the relation between emotion and identity. In my theory, identity in its primitive form is a generic idea; it in and of itself does not provoke emotions. Only identity associated with emotional discourses has the capacity to arouse one's feelings. Imagined nostalgia is one of the emotional discourses identified in my research, which can generate its audience a sense of belongingness and attachment when the audience embrace a certain generic concept (identity). The feeling is 'imagined' not only because nostalgia is by definition an emotion generated from memories, but because the subject of this discourse does not have to have personally experienced the past for which he/she is nostalgic. Rather, the nostalgic feelings can be mediated by a third party: an admired family elder (as when Liwen¹ had a strong sense while visiting Shandong Province that it was the hometown of her grandfather); or a prevalent story in the in-group (as when Lan² recognised the Great Wall in China as the

¹ Liwen, *waishengren*, is a 25-year-old female student living in Taipei. She once possessed a strong emotional attachment for China, forged and shaped by her feelings for her *waishengren* grandfather who came from Shandong Province in the late 1940s. She hesitates to claim Chinese identity now because she feels keen difference between herself and Chinese people since visiting China. And she is also reluctant to assume Taiwanese identity because she believes the idea is being manipulated by the DPP for political gain. That said, Liwen firmly supports Taiwan independence and opposes unification with China because of the great difference between the two peoples. Her report is mainly presented in Chapter 3.

² Lan is an 82-year-old *benshengren* woman who lives in Taichung County. She holds dual identity, both Chinese and Taiwanese. However, she only expresses her Chinese identity when being asked by "big" (high-ranking) officials. She supports the KMT because she has done so for decades; she trusts the KMT

locus of a folktale her father used to tell her); or an image constructed by the government (Luohung³'s feeling that this was his motherland when visiting China, due to the discourse he learned as a schoolboy from the early KMT government). Because these feelings have strong characteristics of regionalism, they are typically summoned in the service of identity politics.

Moreover, since discourses are socially constructed, so are meanings of identity. The socially constructed nature of identity thus suggests the important role of history in the making of identity. Several of my study participants who lived through the period of Japan's colonial rule state, in their interviews, that Taiwanese people did not usually use the term 'Chinese' during that period, and in the first few years after the Chinese government took over the island, people tended to use the term only to refer to immigrants who came to Taiwan from the mainland at the close of the civil war. Their reports clearly show that the usage and meaning of 'Chinese' evolved during, and was closely related to, key historic events and turning points in Taiwan's social development. Moreover, at the personal level, the understanding of the terms 'Chinese' and 'Taiwanese' is shown to be heavily shaped by an individual's natal environment and early life experiences. A child in a *waishengren* family in Taiwan might conceptualise 'Chinese' differently from a child in a *benshengren* family: the former might extend the term to equate with the idea of a supra-ethnic Chinese nationality, while the latter might use it to refer exclusively to the *waishengren* group in Taiwan.

and believes the KMT members are straight and honest, while the DPP members are more self-interested. Lan does not know how to answer the question about unification/independence. She says unification with China might be good for Taiwan, because by doing that Taiwan may further develop but, generally, this issue seems meaningless to her. Her report is discussed in Chapter 2.

³ Luohung is a 64-year-old teacher in a private high school. He is a *benshengren* (Hakka ethnicity) who was born in Pingtung County and then studied and worked at Taipei. Luohung holds dual identity but is inclined towards Chinese. He once had great passion for Chinese nationalism and firmly supported the unification between Taiwan and China. After visiting China several times and realising the differences between mainlanders and people in Taiwan, Luohung came to support retaining the status quo. He has been constantly supporting the KMT and considers the party as the only legitimate leader of Taiwan. His report is mainly presented in Chapter 3.

Identity: Value-oriented Discourse

A more crucial question is why and how individuals opt for specific generic labels instead of others to serve as long-term, non-context-based identities. Again, my thesis argues that identity in and of itself does not have the capacity to mobilise people; on the contrary, only identities associated with value-oriented discourses can urge audiences to take action, including claiming the proposed identities. The same argument also applies to identity politics; unless an identity is associated with value-oriented discourses, it is merely a conceptual term and can hardly be expected to inspire political action. In that case, identity exists on the symbolic level—that is, people will know they are ascribed to certain categories, but lack motivation to act in the interest of their category.

My research identifies three types of value-oriented discourses. The first one is ethical narrative, a discourse setting moral values. The ethical narrative describes one group of people as the oppressed benevolent and another as the oppressing malignant. It reminds members of the benevolent group of their oppressed condition (or history), inspiring positive feelings in them towards other members of their in-group and negative feelings towards members of the out-group, and urging them to take moral/political action to support the former and oppose the latter. The function of an ethical narrative is thus twofold: both emotional and moral/political. From the perspective of the individual, an ethical narrative offers a platform to generate various emotions and to practice morality in its most basic form: an individual can use ethical narratives to play the role of a hero fighting a villain.

Another value-oriented discourse is ‘cultural hierarchy’. Unlike ethical narratives, which assign benevolent and malignant roles to different identities, cultural hierarchies assign socio-cultural values to them, defining which group may enjoy higher status and which deserves inferior status in the society. Like ethical narratives, cultural hierarchies

exert their influence on group members on a psychological level: People who belong to groups designated as superior may take on a sense of superiority and enjoy greater self-confidence. By the same token, people belonging to groups designated as inferior tend to feel incompetent and experience low self-esteem. These negative sentiments can lead to either of two opposite outcomes: An individual who feels being unjustly treated in the society might seek opportunities to challenge the dominant structure. Alternatively, he/she might be inclined to accept the prevailing value system and seek a more tolerable position in the existing structure, because the person lacks the material or psychological resources that would be required to challenge that structure.

The third type of value-oriented discourse is political ideology, which influences people's identity formation with political values, that is, their beliefs or preference for ideas such as capitalism, liberalism, and socialism. For these participants, identity is not an important issue: they believe that social classifications such as *waishengren/benshengren* and Chinese/Taiwanese are meaningless and frequently cause conflicts. In their case, other forms of ideology, i.e., their political beliefs, shape their political views and identities. Since identity does not really matter to them, their selection of identity is not directly influenced by the ethical narratives and cultural hierarchies in which these identities feature. And, by the same token, the influence, if any, of political ideologies on their identity is rather indirect and mediated by third parties. Often, the subject prefers the identity promoted by the political party that he/she supports, and supports the party because it represents the political ideology in which he/she believes. In other words, political ideologies influence the identity of this type of individual by means of party images.

Chapter 5 illustrates this mechanism. Because of certain historic factors, the two political parties in Taiwan—the KMT and the DPP—might be easily associated with certain political ideologies. For instance, the KMT tends to be regarded as more

conservative and more concerned with the economy than the DPP. As a result, the conservatives and neoliberals may be inclined to prefer the identity that the KMT promotes, that is, Chinese identity.

Six Types of Response to Identity Labelling

When being interpellated by a certain identity discourse, my fieldwork participants typically have six types of response. These are: failing to recognise, ignoring, being unwilling to accept, conforming to, challenging/deconstructing, and changing identities.

Failure to Recognise

‘Failure to recognise’ means the identity label fails to be identified by the subject. Identity politics fail at the symbolic level: individuals do not really comprehend what a particular generic idea means and why it matters in the society. Under these circumstances, they do not even know whether they should claim or be assigned to a category. For instance, Shuhuei, a 29-year-old hair stylist (*benshengren*) in Taipei, whose reports are presented in Chapter 2, has no idea what the concepts of *benshengren* and *waishengren* really signify.⁴ Owing to her background (limited education, narrow living and working environment, and limited exposure to mass media), she has had no chance to grasp what the provincial-origin classification in Taiwan is, or whether she should be a *benshengren* or *waishengren*. She lacks the motivation to acquire this knowledge because the classification does not affect her life.

⁴ Moreover, lacking the influence of KMT education, Shuhuei doesn’t deem the Chinese New Year to be Chinese. She believes it is a holiday, like Christmas, that is celebrated everywhere. In addition, she has no party preference and no opinion on the issue of unification/independence. As a faithful Christian, Shuhuei relies on God’s guidance and believes He shall lead her (or all humankind) to overcome all obstacles beyond her control, including Taiwan’s politics and future. Her report is discussed in Chapter 2.

Ignoring

The response of ignoring means that identity works at a symbolic level but fails to resonate with individuals emotionally: individuals recognise a generic concept and may identify themselves as a member of the category, but they have no emotional attachment to the group. A good example would be Yuxin,⁵ a 22-year-old student (*waishengren*) from Taipei, discussed in Chapters 2 and 3. She recognises the ethical narrative of East-West antagonism, but does not respond to its identity appeals. More precisely, Yuxin only partially follows the emotional and moral coordinates set by East-West antagonism: When watching movies based on this narrative (such as *Yip Men*), she can recognise who are the good guys and who are the bad, feeling sympathy for the former as well as resentment towards the latter. However, she does not link the narrative with her own reality; she sees the story as being about the historical period decades ago, and this does not relate to her present surroundings. As a result, she does not connect the heroes with the identity of Easterners, nor connect the villain with the identity of Westerners; the positive feelings for *Yip Men* that the movie evokes seem to her exactly the same as those she feel for Superman, James Bond, Harry Potter, or any other hero in Western movies: They are feelings based on morality—normal responses to morality—and she finds it silly to associate these feelings with vague concepts such as Easterners and Westerners. In other words, she may identify herself as one of the Easterners, but she does not regard Westerners as her enemies. Her accounts thus show an exemplary escape from the influence of the East-West antagonistic discourse: Her identification with

⁵ Yuxin's report is discussed in Chapter 2 and 3. She has identified herself as Taiwanese since she was a child, and has always conceived of China and the Chinese as the main enemy of Taiwan, as she learnt from textbooks and the news. She thus firmly supports Taiwan independence and opposes unification. As her party affiliation, she supports the KMT and opposes the DPP; which she views as a malicious party that is plotting to seize power and which manipulates Taiwanese identity.

Easterners exists only on a conceptual level and lacks any affectional investment; the identity cannot provoke her feelings nor compel her political/moral actions.

Unwillingly Accepting

In the reaction of ‘reluctantly accepting’ a particular identity, the identity label exerts effects on both the symbolic and emotional levels—the subject not only symbolically recognises and accepts the socially constructed classification (meaning articulations made by society) but also responds with a sense of unwillingness to accept the imposed classification. For these subjects, the ascribed identity category has negative connotations, but they still take on the undesirable label because they believe they possess unchangeable attributes associated with the category.

This identity pattern points to a flaw in the traditional social identity theory, which considers an intuitive desire for self-enhancement as one of the major forces in identity formation. That approach thus has no explanation for individuals who reluctantly accept an undesirable identity because, from its perspective, subjects have an innate drive to profess a high-value identity with positive images. My research, by contrast, shows that the individual’s unwillingness to accept a label may push him/her away from that identity or, intriguingly, may further strengthen his/her identification. This mechanism of reinforcement is similar to the work of moral obligation: that is, if we have no choice but to adopt (be assigned) a certain identity, then we are morally obligated to have positive feelings for that identity. Intuitively, in this response to identity labelling, the influence of meanings seems stronger than that of emotions, since subjects are compelled to take this type of identity because of its prevalent meanings regardless of their own negative feelings. However in fact, when the obligated, moral feelings generated by this identity ascription are considered, feelings may play as important a role

as meanings. This response can be vividly seen in Jane, a 37-year-old housewife (*waishengren*; married to a *benshengren*) in Taipei.⁶ She identifies herself as Chinese, but makes statements in her interview such as ‘We are Chinese, and we can do nothing about that,’ which manifest her reluctance to embrace the identity.⁷ Yet her reluctance does not lessen her affection for China or Chineseness. In fact, she believes it is her duty to maintain positive feelings for her Chinese identity.

Conforming

‘Conforming’ is both highly symbolic and highly emotional. Not only do individuals recognise identity categories and believe that they represent certain ideals, values, moral views, and so forth (to them, the articulation between these values and identities is so close that it seems it is the identities that represent the values), but they also feel strong emotional attachments towards their categories/groups.

As mentioned above, to impel subjects to accept an identity both cognitively and emotionally, the identity must be able to be associated with emotional discourses. This mechanism and this type of response in fact constitute the core of my analyses of the thesis, particularly those presented in Chapters 2, 3 and 4. For instance, on the one hand, the Chinese identity of Haoping⁸ (a 32-year-old military officer in I-lan; *benshengren*) and

⁶ Jane was born in the United State in 1977 and returned to Taiwan for her early education. She went back to the US to earn a bachelor’s degree. She is married to a *benshengren* and is now settled in Taipei City. Jane’s report is presented in Chapters 3, 4 and 5.

⁷ Jane’s reluctance to claim Chinese identity comes from her perceptions of the cultural hierarchy based on the distinction between the Easterners (Chinese) and the Westerners, in which the latter are conceptualised as superior, more modern, more civilised than the former. Yet Jane still unequivocally identifies herself as Chinese, due to her firm belief of the East-West antagonistic narrative. Her embrace of Chinese identity may also be a backlash against the inferior self-image assigned to her in the cultural hierarchy between the Easterners (Chinese) and the Westerners.

⁸ Haoping’s report is presented in Chapters 2 and 3. He identifies himself as both Chinese and Taiwanese, has no salient party preference, and fervently supports unification with China so that Taiwan and China can become a super-power to dominate the world. He believes in the East-West antagonistic narrative; his Chinese identity becomes much more salient in that context.

that of Jane are closely linked to the East-West antagonistic discourse; and Meizhu's⁹ (a 83-year-old *benshengren* woman) Chinese identity is intimately linked with her view of a cultural hierarchy in which the elites and supporters of the KMT are superior to those of the DPP. On the other hand, the claim of Taiwanese identity of Yuxin draws heavily from the discourse of China-Taiwan antagonism, whilst the Taiwanese identity of Weiting (59-year-old private school English teacher, *benshengren*) is significantly forged and shaped by the anti-*waishengren* discourse.¹⁰

Challenging and Deconstructing

Besides being unrecognised and ignored, an identity can also be challenged and deconstructed. This response means that an individual suspects, questions, and even rejects the discursive articulations (meaning/images) associated with an identity. A good example would be how and why Haoping challenges the anti-*waishengren* discourse presumed to go with his *benshengren* identity. As a member of the younger generation who had not lived through the period when the provincial-origin conflict had a heavy impact on Taiwanese society (the first few decades after the KMT government took over Taiwan), Haoping does not really believe the ethical narrative about the *benshengren* group being oppressed by the *waishengren* group. When he encountered the anti-*waishengren* discourse promoted by some political dissidents in the development of Taiwanese nationalism and the anti-authoritarian movement against KMT rule, his response was to

⁹ Meizhu possesses dual identity and is a staunch KMT supporter. She supports the party because she conceives of its members and supporters as better mannered, better educated, and thus more capable of ruling the society than those of the DPP. Her report is discussed in Chapter 4.

¹⁰ Weiting holds anti-KMT, anti-*waishengren*, and Taiwanese nationalism discourses. He believes the *waishengren* elites (particularly KMT members) and those who benefit from them have been jointly oppressing and exploiting the Taiwanese people. He fervently supports the DPP and Taiwan independence. He identifies himself only as Taiwanese; 'Chinese' for him means the *waishengren* group and the people of the PRC. His reports are presented in Chapter 3.

doubt the credibility of the discourse. His personal experience seemed more like the *benshengren* excluding *waishengren* with this antagonistic discourse.

More cases of challenging/deconstructing identities can be found in my discussion of cultural hierarchy in Chapter 4. For instance, the cultural hierarchy which values speaking Mandarin over speaking Taiyu was constructed in the historic situation when the Mandarin-speaking group dominated Taiwanese society politically, socially, and culturally. This dominant value system was suspected and challenged when the Taiyu-speaking middle class emerged and when Taiwanese nationalism developed. In this historic situation, Taiyu speakers started to fight not only for greater political rights but also for higher socio-cultural status in the society. Participants such as Weiting, Kenta, and Kazue present convincing examples for this case. In their interviews they express their resentment at the KMT's early language policy, which banned Taiwanese people from speaking Taiyu, and now they deem speaking Taiyu to be an important criterion of being an 'authentic' Taiwanese.

The cultural hierarchy that considers the people of the PRC to be less modern, less civilised, less polite, and thus inferior to the people of Taiwan is another example. Since one of the main criteria of this hierarchy is economic status, this value system has been significantly challenged since the PRC has achieved remarkable economic growth.

Changing Identity

Changing identity occurs when subjects feel out of place, uncomfortable, or disappointed in the identities they have originally embraced, and perceive other identities as more suitable. The process occurs at the levels of both meanings and feelings, and is influenced by the works of various types of discourses, such as ethical narrative, cultural hierarchy, political ideology, and so on. For instance, Haoping used to identify himself as

Taiwanese only, but changed to a dual identity when he learnt from textbooks that the meaning of ‘Chinese’ includes Taiwanese (that they are the same ethnicity and share common history and culture). His Chinese identity is further reinforced by the East-West discourse that he absorbs from pop culture in the form of movies, TV shows, fiction, and so on. His conversion thus was brought about by a change in his understanding of the idea of Chineseness and further reinforced by the feelings evoked by the East-West antagonistic narrative.

Chenli¹¹ (60-year-old male employee of a state-owned company at Kaohsiung, *waishengren*) changed his identity from ‘simply Chinese’ to the dual identity when his faith in the KMT was shaken. Once he came to regard the party as a corrupt authoritarian regime, Chenli not only started to suspect the KMT’s discourses (including Chinese identity), but also became open to the discourses opposing them (including Taiwanese identity). Under this condition, he sees that fewer and fewer people in Taiwan would deem themselves to be Chinese, and the term ‘Chinese’ has come to signify to him the people of the PRC, whom he regards as inferior to the people of Taiwan. His conversion of identity is thus related to his early anti-authoritarian ideology against the KMT, his sense of the terminological changes in Taiwanese society, and his perception of a cultural hierarchy that values Taiwanese-ness more highly than Chineseness.

Weiting used to identify himself as Chinese, but now has totally abandoned this identity. To him, Chinese used to include Taiwanese people, but when he heard from family members and schoolteachers about the ‘hidden’ history of Taiwan, and began to accept the anti-KMT/*waishengren* discourses and Taiwanese nationalism, he then believed

¹¹ Chenli’s report is mainly discussed in Chapter 2. He confesses that as a *waishengren*, he holds a certain degree of Chinese nationalism. On an emotional level, he would like to see Taiwan and China reunited in the future, as they were in history. Yet, on the rational level, he is not so sure, because he opposes the dictatorship of the PRC and perceives great difference between way people live in Taiwan and on the mainland. Chenli has conflicting impressions of the political parties in Taiwan, too. He thinks the KMT is good at economic development but is flawed by corruption. Similarly, while he views the DPP as a fresh and aspirational party, he is averse to its manipulation of Taiwanese identity.

that 'Chinese' could no longer describe him, and limited the term to refer only to *waishengren* elites and the people living across the Strait. His identity changed because of the operation of the anti-*waishengren* (and anti-KMT) ethnical narrative.

Liwen also used to identify herself as Chinese, believing that the category could cover both the people in Taiwan and on the mainland. However after visiting China in person, she acutely felt a great difference between the people of the PRC and Taiwanese people (herself). Her new image of the mainlanders was negative, causing her to doubt and distance herself from her Chinese identity. Her personal experience of travelling in China and her perception that Taiwanese were superior to Chinese contributed to her identity change.

Identity Renunciation

Saying that identity as discourse is always socially constructed and thus always serves the aims of certain power(s) is not to neglect its role in substantial struggles and resistance against oppressors in the real world. It is true that mobilised identity can serve various political purposes. On the one hand, it can be used for emancipatory politics to challenge and transform an unjust status quo. On the other hand, it can be used by a dominant power to mobilise people against fictional or imaginary enemies and, by doing so, to distract them from other issues at stake. It is thus the moral duty of each individual, not to mention intellectuals, to acquire the ability to judge whether identity politics are operating for the oppressed or for the oppressors. To that end, I propose three judging criteria as follows.

The first criterion is the discursive distance between identity politics and reality. Since identity is by definition capable of guiding its subject's explanation and interpretation of reality, it is important to assess to what extent an identity can adequately

reflect the real world, or how a type of identity politics can reasonably describe oppressive structures in the society. For instance, when the East-West antagonism advocates proclaim how malicious Westerners are oppressing the people in the East, one must inquire to what degree this accusation corresponds to contemporary reality. While it is true that the notorious ideology of modern imperialism originated from the West in the seventeenth and eighteenth centuries, imperialism has been transformed; to the extent that it still exists nowadays, it takes the form of neoliberalism. What manages to control the economic and even the political system of a foreign country at present is not so much a political entity of Western power; rather, it is a closely coordinated and integrated combination of interest groups comprising government institutions, banks, corporations, and powerful individuals (such as politicians, capitalists, bankers, and global investors) that endeavour to extract gain from all over the world. The story of the rivalry between East and West over-simplifies the current operation of transnational economic and political exploitation and oppressions. Therefore the identity politics based on this outdated antagonistic narrative fails to adequately describe actual power relations in the contemporary era of globalisation, and people have reason to suspect, when they encounter this narrative, that it is being used to serve other political purposes.

The second criterion to apply is the interpretation of the antagonistic other presented in an identity discourse. Because identity always tends to generalise and flatten the categorised groups and to diminish the heterogeneity of both ingroups and outgroups, this criterion stresses the symbolic distance between the interpreted groups in identity narratives and the reality. That is, how does the identity politics direct its subject to target a specific rival? To what extent does it try to generalise and essentialise a particular group? The East-West antagonism seems once again to fail in regard to this criterion. It is very clear that not all Westerners embrace the imperialist ideology or support the exploitation of less developed nations and peoples. The anti-*waishengren*

discourse fails as well; it is problematic in generalising all *waishengren* as the dominant class in Taiwanese society who endeavour to extract every ounce of interest from *benshengren*.

The China-Taiwan antagonist narrative offers another example of a discourse that fails when this criterion is applied. It seems more convincing than the East-West antagonism and the anti-*waishengren* narrative, since it is true that China nowadays is the biggest threat to Taiwan. Indeed, the PRC has never renounced the possibility of military attack on the island, and its intention for future political integration between the two sides is perceptible. Yet the question is, what enemy should the discourse really be targeting? Is it the Chinese government that Taiwanese people should fight against? Or is it the Chinese Communist Party? Or the Chinese people in general, who not only deny Taiwan's sovereignty but also wish to acquire the island? Or is it rather the shameful Taiwanese politicians and capitalists who seek to serve their own political and economic interests by sacrificing Taiwan's sovereignty?

This is thus the biggest flaw of identity politics: by its nature, it eliminates the heterogeneity of its targeted groups—not only ingroups but also outgroups. This generalisation and essentialisation of social groups usually leads to catastrophe or social conflict. Hence, the third criterion for assessing identity politics is the extent to which it is indispensable for the achievement of emancipation: Is there any other ideology that can replace the role of identity politics in rallying people to fight against existing oppression or societal injustice? Is there any other discourse that can replace identity politics to mobilise people to achieve the goal of liberation?

By presenting all of these different identity patterns, my thesis shows, on the one hand, that there is no single, over-arching determinant of identity formation and, as a result, there is no specific identity pattern that an individual should adopt. On the other, although constrained by natal surroundings and various social discourses, people still have a choice of responses to identity labelling.

By viewing identity as a value-oriented discourse, this thesis suggests that people claim certain identities yet not for the sake of those identities themselves. Instead, people are prompted to embrace an identity because of the values that the identity represents. This dynamic implies that people need not be preoccupied with embodying an identity, but instead of pursuing the identity itself can directly pursue the values that it conveys. The same argument applies when emotion is concerned: people need not get involved in a narrative of identity to gain emotional surplus (to generate and enjoy positive feelings such as senses of belongingness, attachment, justice), for these emotions can surely be obtained from alternative activities. In sum, an individual is not bound by any particular identity or ideology, and generally, identity politics is neither a necessary nor sufficient tool for liberation from or resistance against oppression. Ideally, identity should thus be avoided if an alternative value, discourse, or ideology can serve the same emancipatory political purpose.

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