





This is to certify that the  
dissertation entitled

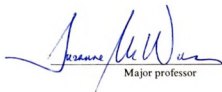
The Democratization of Taiwan's Social Studies Curricula:  
A Study of Teaching National Identities

presented by

Phone-Mei Chou

has been accepted towards fulfillment  
of the requirements for

Ph.D. degree in Teaching, Curriculum,  
and Educational Policy

  
Major professor

Date 26 July 1999



**LIBRARY**  
Michigan State  
University

PLACE IN RETURN BOX to remove this checkout from your record.  
TO AVOID FINES return on or before date due.  
MAY BE RECALLED with earlier due date if requested.

DATE DUE	DATE DUE	DATE DUE
JUL 20 2001 <del>12 FEB 01</del>		
JUL 05 2002 <del>12 FEB 01</del>		
08 FEB 05 2005		



**THE DEMOCRATIZATION OF TAIWAN'S  
SOCIAL STUDIES CURRICULA:  
A STUDY OF TEACHING NATIONAL IDENTITIES  
VOLUME 1**

By

Phone-mei Chou

**A DISSERTATION**

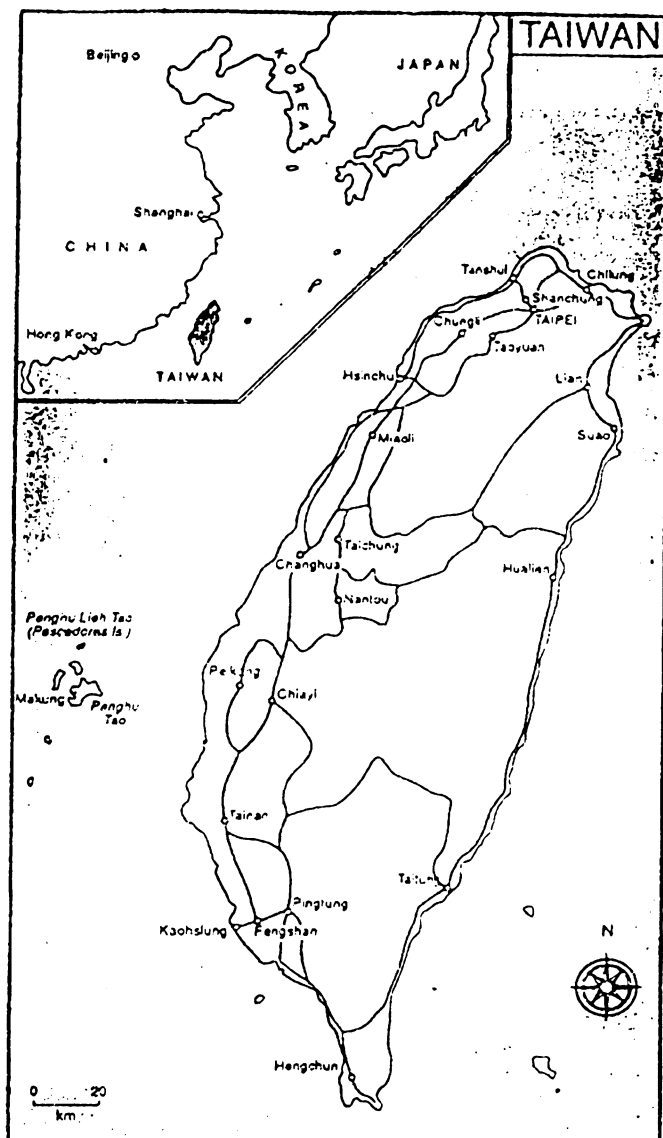
Submitted to  
Michigan State University  
in partial fulfillment of the requirements  
for the degree of

**DOCTOR OF PHILOSOPHY**

Department of Teacher Education

1999







## **ABSTRACT**

### **THE DEMOCRATIZATION OF TAIWAN'S SOCIAL STUDIES CURRICULA: A STUDY OF TEACHING NATIONAL IDENTITIES**

By

Phone-mei Chou

The purpose of this study is to describe and explain how three elementary school teachers taught Taiwan history in light of national identity formation. I focus on the role of the teacher's political orientation, in general, and national identity, in particular, as well as the teacher's understanding of Taiwan's history and the way in which this effects their teaching of that history in fourth grade social studies classrooms.

Three teachers were selected for this study. Interviews were conducted to elicit the teacher's political party preferences, concepts of being Taiwanese/Chinese, understanding of Taiwan history, and pedagogical philosophies concerning the teaching and learning of history. I observed and documented each teacher's classroom activity while teaching a unit of Taiwan history, from December of 1997 through January of 1998.

The data suggests that the political orientation of each teacher not only serves as a lens through which his or her understanding of Taiwan's history is filtered, but also as a constraint with respect to the learning and teaching of alternative accounts of Taiwan's history. Political orientation and subject matter knowledge had a direct impact on each

teacher's emphasis of certain themes to the exclusion of others. I found no evidence, however, to suggest an influence on their teaching styles. All three teachers adopted an authoritarian and teacher-centered pedagogical approach.

I outline three major challenges faced by teachers with respect to educational reform and the call for the students to be educated to be democratic citizens with critical thinking abilities: (1) teachers' prior experience of being educated under an authoritarian educational system; (2) teachers' subjective perception of their own national identity as a constraint for learning and teaching alternative accounts of Taiwan's history; and (3) ideological controversy concerning what facts constitute authentic historical knowledge. Two implications of the three teachers' pedagogy are given special attention. First, with respect to curriculum reform, the teaching of history needs to focus on developing students' ability for critical and independent thinking about history instead of merely presenting historical "facts" to students; second, teacher education in both pre and in-service programs needs to provide alternative teaching models so as to enhance teachers' ability to foster creative thinking that takes into account multiple perspectives in an unbiased fashion.



Copyright by  
Phone-mei Chou  
1999





To my parents  
and  
my son

## ACKNOWLEDGEMENTS

First and foremost, my appreciation and gratitude is extended to Dr. Suzanne M. Wilson, who served as my dissertation director and chairperson of my guidance committee. Her encouragement, guidance, and invaluable suggestions made this dissertation possible as a result of her assistance to my professional growth over the last six years. I shall never forget the profound level of her commitment to and investment in my intellectual journey and her support at times when my self-confidence failed me. To her I owe the greatest adventure and source of fulfillment in my life. During the last two years of writing this dissertation, she worked tirelessly to help me develop and refine my ideas and to revise my writing. Without her steadfast and unfailing support, I would never have been able to complete this project.

I also wish to thank my dissertation committee, Dr. Philip Cusick, Dr. Helen Featherstone, Dr. Lynn Paine, and Dr. Jack Schwille. I took classes from each of them. In Dr. Featherstone's class, Teacher Learning, I was encouraged and enabled to reflect most profitably on my own autobiography as a student and then as a teacher in Taiwan. I began my serious investigation of Taiwan's social studies curricula in Dr. Lynn's class on Comparative Education. In Dr. Cusick's class, I developed the ability to conduct qualitative research as inquiry. Finally, in the summer of 1996, I had the privilege to enjoy Dr. Schwille's class, Education In Transition, focusing on countries in political transition and the impact of political change on learning, teaching, and educational policy-making. The intellectual inspiration offered by these excellent professors served as my guide, leading me to explore and develop the ideas that would later culminate in

this dissertation. Throughout the writing of this dissertation, each of them always enthusiastically responded to my quests for help, providing me with invaluable suggestions that served to enriched this study.

My advisor and my committee all serve me always as role models. They accompany me in spirit as I embark on my career as a researcher and teacher educator. They have given me the priceless tools of working not only with educational materials, but also the precious gift of knowing how to teach people.

My appreciation is also extended to Margaret Selasky, whose assistance included arranging appointments with my advisor, mailing my draft dissertation to my committee, receiving corrections of my dissertation from my advisor, etc. I thank my peers, Sheri Levine-Rose, Cindy Hartzler-Miller, and Scott Johnston for their support and assistance in the preparation of my defense.

Appreciation and gratitude is also extended to my friends in my Tai-chi and Buddhist groups, Chiung-ying, Yi-ling, and Pei-fen, who supported me through my periods of depression and despair over the last six years.

Thanks as well go to my friends, Dr. Jong, Yeong-ming, Dr. Kan, Yao-Chiang, and Cheng, Szu-en on whom I could always call for help when I encountered reoccurring disasters in using the computer. I also extend thanks to Dr. Robert Edinger, for his assistance as a professional editor of this dissertation.

I would like to send my sincere appreciation to Mr. Neal Donnelly, the former Chief of the Culture and Information Section of the American Institute on Taiwan, between 1979 and his leaving Taiwan in the early 1980s. As a result of Mr. Donnelly's assistance, I was able to obtain a student visa. This was a critical turning point for me as



the American Institute on Taiwan had refused to issue me a student visa. (They suspected -- inaccurately -- that I would stay forever in the U. S. in the name of study. And, they did this despite the fact that I had been issued an I-20 by the University of Wisconsin at Madison, the University of Texas at Austin, the University of Indiana, and Michigan State University. The AIT officials made this judgment on the basis of several factors: I brought my son; I was already 38 years old, which was highly unusual for Taiwanese students going abroad to study; I quit my job as a high school teacher, which was considered a good position in Taiwan; and I chose to go abroad to study despite the fact that I would be separated from my husband.). Without Mr. Donnelly's assistance, I would never have attained this achievement. I shall appreciate his assistance to myself and my family forever.

Finally, I am indebted to my parents and my parents-in-law. While not themselves well-educated, it is through their generosity that I was able to pursue my professional growth. They encouraged me and supported me in numerous ways. I thank my son, Goan-yi, with whom I share such treasured memories of living together at Spartan village from 1993 to 1996, until he went to live with his father in Taiwan to prepare for high school entrance examinations in the summer of 2000. My husband, Dr, Hsing-yi Chen, has also been extremely supportive in many ways. He not only has performed extremely well in his own research, but he has taken good care of our son for the last three years. I want to thank him, especially, for his patient endurance of our long separations over the past six years. His faith and love is the most valuable thing in my *Life*.





## TABLE OF CONTENTS

<b>List of Tables .....</b>	<b>xiii</b>
<b>Abbreviations .....</b>	<b>xiv</b>
<b>Chapter One: Introduction .....</b>	<b>1</b>
My Personal Political and Ideological Journey .....	2
My Emerging Research Interests .....	10
The Role of Education in National Identity Formation .....	15
Putting the Pieces Together: An Inquiry into National Identity .....	19
Overview of Chapters .....	21
<b>Chapter Two: Taiwan: History and Conflicting Views of National Identity .....</b>	<b>23</b>
Some Background .....	23
The Cheng Kingdom (1662-1683) .....	26
The Era of Ching Dynasty Rule (1684-1894) .....	29
The Era of Japanese Colonial Rule (1895-1945) .....	32
The Era of KMT Rule (1945 to the Present) .....	39
The 2/28 Incident .....	40
The Establishment of the ROC and Its Failure in China (1912-1949) .....	44
1950s to 1960s: Counterattacking the Mainland and Saving <i>Turng-bau</i> (Siblings) .....	50
One-Party Dictatorship .....	53
The Political System of the ROC on Taiwan .....	54
Political Change During the Chiang Ching-kuo Era (1972-1988) .....	58
Taiwanization .....	61
Democratization .....	64
The Emergence and Growth of the Democratic Progressive Party (DPP): 1970s-1980s .....	69
Taiwanese Nationalists .....	69
Opposition Magazines and <i>Dang-waih</i> .....	73
The Opposition and Election Campaigns .....	77
Cultural Change .....	80
Transformation into a Full-fledged Democracy and Shaping a Common Shared Destiny: the 1990s .....	84
Constitutional Reform .....	85
<i>Tuong</i> (Unification) versus <i>Dur</i> (Independence) .....	92
The Guidelines for National Unification .....	93
Lee Teng-hui's Vision of <i>Sheng-mihng guhng-turng-ti</i> (Living Community) .....	95
The Evolution of Taiwanese Independence within the DPP .....	97



<b>Chapter Three: Explaining Curriculum Change: Social Studies in Taiwan .....</b>	<b>105</b>
The Educational System .....	106
The Aims of Education and the School System.....	106
The National Curriculum .....	108
The Keh-cherng Biau-juun .....	108
Textbooks.....	120
The Social Studies Curricula .....	123
Social Studies Curricula from the 1940s to the 1970s.....	123
Social Studies from 1977 to 1993: A Closer Examination.....	128
Teaching Goals in the 1975 Social Studies Curriculum Standards .....	129
Textbook Content .....	130
The Current Social Studies Curricula .....	137
Teachers' Manuals .....	138
The Revised Social Studies Textbooks.....	141
Conclusion .....	145
 <b>Chapter Four: Teachers and Their National Identities .....</b>	 <b>148</b>
Three Teachers.....	148
Ms. Chen.....	149
Ms. Hu.....	152
Mr. Lin .....	155
Scholarship on Political Orientation and National Identity .....	159
Three Teachers' Political Orientations and National Identities.....	166
Political Party Preference.....	167
Who Are We? Chinese? Taiwanese? Both? .....	178
The Multiple Identities of Ms. Chen and Ms. Hu .....	179
Mr. Lin: A Single Taiwanese Identity .....	181
Attitudes Toward Culture and Language .....	184
Subject Matter Knowledge .....	191
Teachers' Subject Matter Knowledge of Taiwan History .....	194
Knowing the Content of Taiwan History.....	194
Understanding the Interpretative Nature of Taiwan History .....	213
What Is History? .....	213
What Do Historians Do When Studying History? .....	218
Taiwan history Interpreted form a Taiwanese-centered Perspective .....	221
One's Political Lens as A Lens for Understanding Taiwan's History .....	223
 <b>Chapter Five: Views of National Identity from Classrooms.....</b>	 <b>230</b>
Ms. Chen:.....	230
Vignette One: Our Ancestors Came from Da-lu (the Mainland).....	238
Vignette Two: Cheng Cheng-kung Recovered Taiwan .....	243
Vignette Three: The Recovery of Taiwan .....	245
Reading the Vignettes .....	248

Ms. Hu.....	255
Vignette One: Our Ancestors Came from Da-lu (the Mainland).....	259
Vignette Two: Two Historical Figures .....	262
Vignette Three: Japanese.....	265
Vignette Four: The Anti-Japanese War and the Recovery of Taiwan .....	266
Reading the Vignettes .....	268
Mr. Lin .....	273
Vignette One: The Map .....	277
Vignette Two: Neo-Taiwanese .....	281
Vignette Three: The Dutch Rule and Cheng Cheng-kung Rule .....	284
Vignette Four: The Recovery of Taiwan .....	286
Reading the Vignettes .....	290
<b>Chapter Six: Cross-Case Analyses .....</b>	<b>294</b>
Selecting Different Subject Matter Themes as Curricular Foci .....	294
Theme One: Ancestral Home in China versus Neo-Taiwanese Perspective .....	294
Theme Two: Our Country: China versus Our Country: Taiwan .....	296
Theme Three: Two Great men who recovered Taiwan versus Two Political Figures who Occupied Taiwan .....	298
Theme Four: Aboriginal Tribes versus Chinese Han People .....	300
Theme Five: Chines versus Foreign Rulers .....	302
Similarities and Differences in Pedagogy .....	307
Ms. Chen: A "Constructivist Approach" .....	308
Ms. Hu: Teaching as Transmitting Textbook Knowledge to Students .....	310
Mr. Lin: Teaching as Preaching .....	311
Similarities in Teaching Practice .....	313
Explanations of the Similarity .....	315
Lacking Pedagogical Content Knowledge of Teaching History .....	315
Beliefs about Learners and Subject Matter .....	317
Beliefs about Learning History .....	318
<b>Chapter Seven: Lessons Learned .....</b>	<b>322</b>
Challenge One: The Role of Teachers in the Transformation of Authoritarian Culture .....	324
Challenge Two: The Subjectivity of National Identity as a Constraint on Teachers' Learning and the teaching of Multiple Perspectives Concerning Taiwan's History .....	330
Challenge Three: In the History Wars: Whose Facts Constitute Knowledge? .....	335
Great Britain .....	335
South Africa .....	336
Russia .....	336
The United States .....	337
Taiwan .....	339
Implications of the Culture Wars over the Teaching of History for Educational Reform .....	346





Implications for Teacher Education.....	351
Conclusion .....	355
<b>Appendix A: Notes on Methods.....</b>	<b>358</b>
Research Design.....	358
Selection of Informants and Gaining Access to Research Sites .....	359
Criteria for Selecting Informants .....	359
Meeting Informants Interview .....	360
Data Collection .....	363
Interviews .....	363
Observations .....	369
Documents .....	371
Data Analysis .....	372
The Researcher's Role .....	376
<b>Appendix B: The ROC Map in Taiwan's Textbooks .....</b>	<b>380</b>
<b>References (in English).....</b>	<b>382</b>
<b>References (in Chinese) .....</b>	<b>400</b>

## LIST OF TABLES

Table 1. Topic Identification: Cross-Case Comparison.....	202
Table 2. Topic Identification 15 Topics in the Textbook .....	202
Table 3. Topic Identification 65 Topics Not Included in the Textbook .....	203

## ABBREVIATIONS

CCP	Chinese Communist Party
DPP	Democratic Progressive Party
KMT	Kuomintang or National Party
NICT	National Institute for Compilation and Translation
PRC	People's Republic of China
ROC	Republic of China



## CHAPTER ONE

### INTRODUCTION

I was born and raised in Taiwan where I later became a teacher. Like my parents before me, I have been part of the unfolding history of Taiwan's development of as a nation. Taiwan, known as *Formosa* (a beautiful island), was first occupied by the Dutch, then the Japanese, and then finally became a haven for Chiang Kai-shek when he fled the Chinese mainland, turning Taiwan into a military state devoted to the service of himself and his Nationalist associates. As a consequence of these successive waves of conquest, political, geographic, and ethnic boundaries have been in a constant state of flux and the concomitant questions of "What is a nation?" and "Whose nation is this?" have had a profound and controversial significance that few Westerners would understand.

Not surprisingly, these questions of individual and collective national identity eventually found their way into the schools, as schools play a crucial role in a society's reproduction or re-creation itself (and its identity) -- whether this be freely adopted or implanted by force. As a teacher, I am particularly interested in the role of teachers in this process. The purpose of this study is to describe and explain the ways in which a teacher's national identity shapes elementary school social studies teaching in Taiwan. My introduction to this study consists of three parts.

I begin by outlining my own political and intellectual autobiography. In a study of political orientations and ideologies, readers may want and need to know where the author is located in these debates. Furthermore, my autobiography reflects the complexities of national identity formation in Taiwan. I then move to a brief description

of contemporary, competing views of national identity in Taiwan, examining the way in which the school system is a major force in the formation of a Chinese identity for Taiwanese people. I conclude with a short literature review concerning the crucial role of citizenship education in the social studies classroom.

### **My Personal Political and Ideological Journey**

I was raised in a Taiwanese family in a small town known for its importance as a naval base in southern Taiwan.<sup>1</sup> My parents went to school during the last decade of Japanese colonial rule, which meant that they received a Japanese education and are bilingual fluent speakers of both Taiwanese and Japanese. I have vivid childhood memories of sitting with my sisters on a *tatami* (a Japanese straw mat used to cover floor) and playing with my parents, cheerfully clapping and singing Japanese children's songs. And thus, as part of my heritage, my parents handed down to me their experiences with the Japanese.

My grandparents, uncles, and aunts lived in the same neighborhood. I often went to my grandparents' home where I was regaled with stories about surviving American bombings during World War II. As a child, my understanding of Taiwan's history began with images of war, poverty, and death. The bitter taste of World War II was ever present

---

<sup>1</sup> "Taiwanese" does not refer to everybody living on Taiwan. To distinguish culturally distinct groups in Taiwan, I use the term "Taiwanese" to refer to the population whose ancestors emigrated from the Fukien and Kwangtung Provinces to Taiwan from the 17<sup>th</sup> to the 19<sup>th</sup> century. Thus, the terms "Taiwanese people," "Taiwanese family," and "Taiwanese language" in this study, will refer to the population, ancestors, and language associated with people who came to Taiwan before the KMT (Taiwan's ruling party, the Nationalist Party or Kuomintang) arrived in 1949. I use the phrase "the people of Taiwan" or "the population of Taiwan" to refer to the entire population of Taiwan. The term "Taiwanese" may be used in contexts to represent a whole population of Taiwan and to distinguish between citizens of the PRC and citizens of Taiwan. But, in this study, I

in my extended family's stories.

Living in a Taiwanese community, I was surrounded by Taiwanese culture and language. We lived in a farmer's market. The street in front of my home was crowded with vendors and buyers, all of whom spoke Taiwanese.<sup>2</sup> My grandparents took me to night markets, Tao and Buddhist temples, and wedding banquets. I listened carefully as they traded stories with others. My grandmother's favorite entertainment was *Gezaixi* (Taiwanese opera) and every afternoon she listened to a radio station that broadcasted two hours of the Taiwanese opera.<sup>3</sup> Sometimes she took me to theaters where we would enjoy *Gezaixi* actors' performances.<sup>4</sup>

In 1962, when I entered the first grade, I started to learn to speak Mandarin. My third grade teacher, who had lived in Beijing before she fled to Taiwan during the civil war, helped me become extremely proficient and that year I ceased speaking Taiwanese outside of my home. I realized that Mandarin was spoken by educated people, such as

---

adopt a narrow meaning for Taiwanese so as to make distinctions various ethnic groups.

<sup>2</sup> Whether Taiwanese, Hakka, and Mandarin are different languages or are different dialects of the same language is somewhat controversial. However, one linguist (Cheng, 1994), adopting a western linguistic opinion, asserts that, due to the fact that these languages are mutually unintelligible, they are different languages, not different dialects. The native Taiwanese language (*min-narn hua*) originated in southern Fukien Province and is the mother tongue of the majority of the population on Taiwan.

<sup>3</sup> *Gezaixi* (theater of songs), a Taiwanese folk theater, originated during the 1920s in Taiwan's I-lan county; it is performed in colloquial Taiwanese. During the period of martial law in Taiwan (1949-1987), with a Chinese mainland-orientated cultural policy, the KMT government took a dim view of any form of expression of Taiwanese culture, hence *Gezaixi* was neither encouraged nor supported by the government. Due to recent trends towards Taiwanization, *Gezaixi* has gained attention from both governmental cultural institutions as well as academic researchers (Chang, Belinda Huei-Yuarn, 1997).

<sup>4</sup> To aid communication, I italicize Mandarin words. Translations follow in parentheses. Basically, the system of romanization I adopted in this study is based on Dr. Lin Yu-tang Chinese-English dictionary. However, for several individuals and places, I adopted the usage presented in English-language materials published in Taiwan and the United States.



teachers, principals, and government officials. I despised people who spoke only Taiwanese because they were less educated and worked as labors, vendors, and farmers. I admired my mainlander classmates for their decent accents when they were selected by teachers to read textbooks in class or attended speech contests. I wanted to learn to speak Mandarin like they did. My family's cultural heritage and language began to slip away.

Dawson and Prewitt (1969) have claimed that even young children develop a sense of national identity even while they are still ignorant of their nation's history. This was my experience; as early as elementary school, I came to identify the Chinese mainland as my country because the ROC map in textbooks provided me with the image of what my country looked like (see Appendix B).

Several military "spouse villages" were located near my elementary school<sup>5</sup> and half of my classmates were *waih-sheeng ren* (mainlanders).<sup>6</sup> I made friends with them. Taught by our textbooks that the Chinese mainland had been stolen by the "vicious Communists," I sympathized with my mainlander friends' families. They had lost their homeland, fleeing to Taiwan to find shelter. The textbook explained that very soon Taiwan would recover the mainland. I hoped that this mission would be fulfilled and that I could then go with my friends to my great motherland.

---

<sup>5</sup> The KMT government provided military spouse villages to soldiers and their families who followed the government from China to Taiwan in 1949. Separated from Taiwanese who lived outside of military villages, soldiers and their family members (even when their wives were Taiwanese) developed a strong identity as mainlanders and did not have many opportunities to mix with Taiwanese people or to be assimilated into native Taiwanese communities.

<sup>6</sup> The term "mainlanders" refers to Chinese on Taiwan who either came from Chinese mainland in the late 1940s or the early 1950s or are offspring of those people. They came to Taiwan from Chinese provinces after the failure of the KMT in the civil war. The term does not refer to Chinese currently living in the PRC. In Mandarin, mainlanders are

In high school, a military training class instructor recommended that I became a Kuomintang member (the Nationalist party or KMT). In both my university and graduate school studies, my major was *sam-ming juu-yih* (the Three Principles of the People), the KMT's political ideology that promotes the establishment of a modern Chinese nation-state.

After graduation, I taught the Three Principles of the People in the best boys' high school in Taipei from 1982 to 1993. The course aims to cultivate a Chinese identity in students. The textbook is full of speeches of Sun Yat-sen (the national father of the Republic of China (the ROC) and Chiang Kai-shek, the president of the ROC from 1947 to 1975). The last chapter promotes Chinese unification under the Three Principles of the People. Historically, the course is a requirement for university entrance examinations.<sup>7</sup> In order to pass the examination, students are forced to memorize the textbook.

As a Chinese nationalist, I believed in the ROC national father's doctrine and I was devoted to transmitting that doctrine to students. I considered Taiwan to be part of China. My China was not the People's Republic of China (the PRC). Instead, I believed that the ROC was *the* legitimate representative for all of China. For me, Taiwan's mission was to help the Chinese on the mainland seeking democracy and a prosperous life.

Despite the emergence of the opposition and the process of democratization from the 1980s to the early 1990s, my political orientation was not shaken. Instead, my firm

---

*waih-sheeng rern*, which means "people from outside Taiwan."

<sup>7</sup> In accordance with a new educational policy, beginning in the school year 2000, this course will be removed as a requirement for university entrance examinations. Nevertheless, the course will still be a requirement for high school students.

political beliefs served as a lens through which I regarded the opposition's advocacy of Taiwanese independence as a dangerous rebellion. I was influenced by the government's media propaganda, believing that the opposition consisted of trouble-makers who "violate the laws and threaten the order of society," as television reporters asserted.

My political orientation also served to ground my teaching. I agreed with textbook authors' claims and I felt no qualms as I faithfully transmitted textbook information to my students. Nevertheless, I did not completely agree with the Three Principles of the People curricula: the textbook content and examination system resulted in a course that was more like preaching and indoctrination than education. The textbook was dry, much like government propaganda, and the examination forced students to memorize the material. Moreover, the omnipotent examination left no room for teachers and students to discuss and debate textbook content. My teaching tended to be very didactic to prepare students to pass examination.

The longer I taught, the more I became aware of the difficulties of connecting the KMT's political ideology to students' lives. Created in the early 20<sup>th</sup> century, the Three Principles of the People had little relevance to the lives of teenagers in the 1980s. But I persisted, struggling to help students embrace a Chinese identity through learning about the national father's ideals.

By the early 1990s, I began feeling more distant from my students, who were growing up in an era of democratization and were increasingly exposed to the opposition, including street demonstrations. My students became more indifferent and less motivated. Aware of the chaos in our society as it moved from authoritarianism to democracy, I was confused about how my teaching of Chinese nationalism was (or was

not) related to the real world in which students lived. While I still embraced a Chinese identity, I was tired of teaching and, in 1993, I quit my job and went abroad to study, thus escaping my dilemma.

The transformation of my own national identity began in graduate school at Michigan State University. Dean (1997) claims that identity is socially constructed and that identity formation is "a never-ending process" (p. 2). So it has been for me while I have been in the United States. Living in a land thousands of miles away from my homeland gave me a chance to see Taiwan's history and nationalism in an entirely new light.

Preston (1997) argues that identity involves both individual and collective memories, including family histories, folk traditions, and the official history of the state. Living in the United States, I have been homesick. The place to which I am emotionally bound is Taiwan. The feeling of missing Taiwan and my parents often brought back childhood memories, including the Taiwanese community that I lived in, the temple's ritual parades through the streets, the Taiwanese language that I spoke with my grandparents and my parents, and the Taiwanese cuisine prepared by my grandmother. I began to realize that I identified Taiwan more as my motherland than I did China. I also realized that China -- the nation that I only imagined with the aid of textbooks, the great wall, the Yellow River -- mattered very little in my life.

Dewey (1966) accurately describes life as "a self-renewing process through action upon the environment" (p. 2). My study in the U. S. provided me with the opportunity to reconstruct my identity from the relatively objective perspective of a foreign environment. The most striking experience for me in this regard involved introducing myself to other

international students. I did not feel myself to be completely introducing myself when I said I was "Chinese." I needed to add: "I come from Taiwan." In my circle of international colleagues, there are many Chinese who come from a variety of countries, including the People's Republic of China (PRC), the United States, Malaysia, Singapore, and Hong Kong (before 1997). For them, the term "Chinese" has many meanings. I discovered that people in the United States assume that Chinese citizens come from the PRC rather than Taiwan. Yet, when I was in Taiwan, newspaper and television news reporters referred to Taiwan as "China" (for instance, journalists would reports on "developing diplomatic relationships between China and South Africa," referring to Taiwan). However, in the U. S., I realized that "China" means the PRC while Taiwan is called Taiwan. Other experiences contributed to my growing awareness. In stores, products made in Taiwan or in China are clearly labeled. In Taiwan, the government makes efforts to label Taiwanese products as "made in the ROC" and avoids labeling Taiwanese products as "made in Taiwan." People in the U. S. do not confuse Taiwan with China. For them, it is clear that China means the PRC and Taiwan is simply Taiwan.

Over time, I began to peel back the multiple layers that were entailed in being "Chinese." In a broad sense, being *huar-rern* (ethnic Chinese) can be understood as a group of people who share the same culture and lineage. Although their ethnic identity is *huar-rern*, they are citizens of a variety of countries. Normally, the Japanese are citizens of Japan and the French are citizens of France. Similarly, being Chinese primarily means being a citizen of China, the PRC. I began to realize that the term "Chinese" connotes dual meanings, one referring to a Chinese ethnic identity and another referring to a

political or legal identity.

As I met more Chinese, I began noticing other things. Although we shared a similarity in appearance (a yellow complexion and black hair), other differences were not so visible. While the two groups (people from Taiwan and the PRC) of international students communicate in a common language -- *guor-yu* (national language) in Taiwan and *pu-tung-hua* (common language) in China -- it is easy to distinguish one from the other based on differences in the accent of our spoken Chinese and the vocabulary we use. These interactions caused me to reflect on the way in which I had much more in common with Chinese people from Taiwan than from the PRC, or anywhere else. I began to realize that we were not the same.

The PRC's two missile tests conducted respectively in 1995 and 1996 helped to solidify my Taiwanese identity. When the PRC's missiles were aimed at my hometown, Kaoshuing, I felt like my country was being attacked by an enemy country. Moreover, about this time, I took several doctoral courses in which I investigated the evolution of Taiwan's elementary social studies curricula and interviewed two graduate school students from Taiwan. These studies raised my awareness of the multiple, often conflicting views of national identity that currently exist in Taiwan.<sup>8</sup> I found became highly critical of textbooks that I had previously used uncritically as a teacher.

I also read books, written by both American researchers and Taiwanese nationalists, about Taiwan's politics, history, and culture. The authors' views were strikingly different from the official KMT knowledge that I had acquired in school and

---

<sup>8</sup> The term "national identity" is a complicated one and I will explain its multiple interpretations in chapter four. For now, I use the vernacular.

from the government sponsored/controlled media. I began to realize my own previous political and intellectual naïveté. This helped transform my identity from Chinese into Taiwanese. I do not deny that I am Chinese, for it is part of my cultural heritage and descent. However, I now consider myself to be first and foremost Taiwanese, for I am not a citizen of the People's Republic of China.

### **My Emerging Research Interests**

At the end of 1996, I returned to Taiwan and visited several elementary social studies teachers, informally interviewing them about what they thought of the social studies textbook and the recent emergence of the opposition movement. The teachers held competing views concerning national identity. Their opinions about textbooks and the inculcation of national identities also varied in ways that appeared to correspond with their own national identities.

This trip enhanced my interest in the subject matter and I began to wonder: How do the competing views of nationhood that divide the population of Taiwan play out in the school system? Most specifically, how are these competing views represented in social studies curricula?

Subsequently, in November of 1997, I interviewed a historian, Professor Lee, who taught Taiwan history at a university in Taipei. During the interview, he showed me a survey he conducted in the beginning of the 1997 fall semester. He asked two classes of approximately 70 freshmen three questions: Where is our country's capital? What is the size of our country's population? What is the physical size of our country? Students' answers varied. Some claimed that Nanking was the capital (it had been the capital of the ROC before 1949), while others said that Taipei was the capital. Still others said Beijing

(the current capital of the PRC). Similarly, some freshmen estimated that our country's population was 1.2 billion (the population of the PRC), while some said 22 million (Taiwan's population). As to the size of our country, students said that they did not know. Professor Lee concluded that his university students were confused both about the boundaries of their country and their citizenship.

If students are confused about such basic things as this, how can they develop a clear sense of national identity? As Verba (1965) noted:

The creation of a national identity among the members of a nation is the cultural equivalent of the drawing of the boundaries of the nation. And just as nations may have unsettled or ambiguous boundary areas, so may the sense of identity of the members of that system be unsettled and ambiguous. (p. 530)

Since 1991, several surveys have been conducted in Taiwan, which suggest that little consensus exists with respect to national identity. In one survey conducted in 1991, 1243 respondents were asked two questions (Wu, 1992 b). The first question was: "Some people say that if, after its independence, Taiwan could maintain a peaceful relationship with the Chinese Communist government, then Taiwan should become an independent country. Do you agree?" Wu (1992 b) reported that 36.7 percent agreed, while 52.1% disagreed, and 11.2% reported that they did not care. The second question asked whether or not -- Taiwan and mainland China became comparable economically, socially, and politically -- both sides of the straits should unite. Sixty six percent of respondents agreed, while 21.3 % disagreed; 12.1 % did not care.

Wu further divided the responses into four categories. The first category was composed of people who held a "pure" Taiwanese identity. Ten percent exclusively agreed with Taiwanese independence and disagreed with Chinese unification even in the



case that China would become democratic and prosperous. The second category was composed of people who held a "pure" Chinese identity. Thirty eight percent exclusively supported the idea of Chinese unification and disagreed with Taiwanese independence, even in the case that China would not attack an independent Taiwan. Approximately 25 % of respondents held overlapping views; they were not seriously concerned with the issue of national identity. If, after Taiwan's independence, Taiwan could maintain a peaceful relationship with China, they supported Taiwanese independence. If Taiwan and the mainland were to become comparable economically, politically, and socially, they also supported Chinese unification. In other words, they seemed to hold dual national identities, both Chinese and Taiwanese. Wu categorized this group as realists who held dual identities. Similar to the third group, the fourth group was composed of people who were confused over their national identities. Nevertheless, compared to the realists who would make a decision to be citizens of a nation based on the benefits they would enjoy, the fourth group, around 18% of respondents, was composed of conservatives who wanted to maintain the status quo, resisting any change. Among them, about 7% had no preference concerning either Taiwanese independence or Chinese unification and 11% disagreed with both Taiwanese independence and Chinese unification.

The same questions were asked again in 1995 and there was still no agreement. For instance, in response to the first question, 47.4 percent of the people polled supported the creation of a new Taiwanese nation but 29.1 percent opposed it. To the second question, 54 percent of those polled favored Chinese unification in the case of a democratic and prosperous PRC, while 22.4 percent opposed the idea (Cheng, 1997, p. 44). According to several public surveys conducted by the Democratic Progress Party

(the DPP, Taiwan's main opposition party) during 1995-96, about 30% of the masses in Taiwan still regarded mainland China to be part of the ROC (Taiwan), while 10% regarded Taiwan, territorially speaking, to be part of the PRC (China). In other words, about 40% of the respondents subscribed to the "one China" idea. Among the supporters of a "one China" ideology, ten percent agreed that the 1.2 billion people in mainland China had a right to jointly decide Taiwan's future. The other 20 % regarded mainland China and Taiwan as two de facto states under the principle of one China and they saw the ROC on Taiwan as a legitimate political entity whose people had the right to decide their own future (Lin, 1996).

After the PRC's missile tests in March 1996, according to an ROC cabinet-level Mainland Affairs Council report, several surveys suggested that the number of people who would vote for Taiwanese independence began increasing, and the number of those people who would vote for Chinese unification was decreasing (China Times, March 12, 1999). Nevertheless, the Council also indicated that maintaining the status quo remained the mainstream, majority public opinion (China Times, March 2, 1999). Across these surveys, it becomes clear that there is a lack consensus and considerable confusion concerning national identity in Taiwan.

Part of the confusion surrounding conflicting views of national identity might be due to contemporary conflict between political parties. Political parties in Taiwan are agents of national identities. In 1949, the ruling KMT was defeated by the Chinese Communist Party (CCP) in a civil war and retreated to Taiwan. Since then, the KMT's official national policy has been to recover China, building a unified China that would consist of both Taiwan and the Chinese mainland. However, near the end of the 1970s,

an opposition party -- *Dang-waih* (outside the KMT or non-KMT politicians, which went on to form the Democratic Progressive Party or DPP) -- emerged, which was mainly supported by Taiwanese who advocated Taiwanese independence. The New Party, a KMT splinter group, mainly made up of second-generation mainlanders, emerged as well, asserting a Chinese identity and promoting Chinese unification. Then the Taiwanese Independence Party, a DPP splinter party, came on the scene, promoting a Taiwanese identity and an independent Taiwan. Across the spectrum of Taiwan's political parties of today, there are two rival camps -- Taiwanese nationalists and Chinese nationalists -- who define the meaning of "nation" very differently.

For Chinese nationalists, China represents an indivisible trinity comprised of Chinese culture, ethnicity, and nation-statehood. For them, Taiwan is part of the Chinese nation-state and the ROC is the legitimate representative of the Chinese nation-state. For Taiwanese nationalists, Taiwan is not a part of China because they believe that "China" means the PRC. Taiwanese nationalists contend that people who share a Chinese culture and ethnicity are not necessarily part of a Chinese nation-state. Using the modern civic concept of nation, these nationalists believe that a nation-state is not created by ethnicity but rather by public will (Wachman, 1994).

Research concerning national identity in Taiwan found that ethnicity plays a significant role in the dichotomization of national identity (Wang, 1992; Wu, 1992 a; Wu, 1992 b). For instance, *been-sheeng rere* (Taiwanese whose ancestors came to Taiwan prior to the arrival of the KMT) are the primary supporters of Taiwanese independence. By contrast, almost all of the *waih-sheeng rern* (mainlanders) support

Chinese unification.<sup>9</sup> Nevertheless, researchers (Wang, 1992; Wu, 1992 a; Wu, 1992 b) have also found that for *been-sheeng rern*, ethnicity is not the single factor determining their orientation towards national identity. For instance, in the 1991 survey of national identities, among respondents who were *been-sheeng rern* (Taiwanese), thirty five percent held a “pure” Chinese identity, which meant that they disagreed with Taiwanese independence under any circumstances (Wu, 1992 b). It is clear that almost all mainlanders support Chinese unification and oppose Taiwanese independence. By contrast, however, not all *been-sheeng rern* (Taiwanese) support Taiwanese independence. Since approximately 85% of population on Taiwan are *been-sheeng rern* (Taiwanese), it is clear that not all of them support Taiwanese independence.

#### **The Role of Education in National Identity Formation**

Although it appears that ethnicity is a significant factor that serves to explain differences in national identity in Taiwan, at least one other factor also seems equally important. Considering that not all *been-sheeng rern* hold a Taiwanese identity and that some of them even hold a very strong Chinese identity, an important question needs to be asked: What significant factors determine the formation of a Chinese identity among *been-sheeng rern*?

Wang (1992) studied ethnic assimilation among both *been-sheeng rern* (Taiwanese) and mainlanders and claimed that state-supported schooling was the most influential factor contributing to the formation of a Chinese identity among the Taiwanese

---

<sup>9</sup> Very few mainlanders support Taiwanese independence and reject the idea of Chinese unification. In the 1991 survey mentioned previously, only 0.7% held a “pure” Taiwanese identity. Nevertheless, it is arbitrary to assert that all mainlanders support Chinese unification. In 1992, a group of mainlanders formed a *Waih-sheeng rern Tai-*

(Wang, 1992). If this is true, it suggests that the role of public education in the formation of national identity is crucial. Indeed, scholars have long argued that one purpose of public education is related to its civic functions (Dewey, 1966; Parker & Jarolimek, 1984). In the 19<sup>th</sup> century, for example, public schools were established in the United States to Americanize immigrants. Similarly, the emergence of a reunified Germany immediately held implications for its school system. Public education in the reunified Germany has been charged with preparing children to become responsible citizens of a democratic state with a market economy (Dumas & Dumas, 1996). Political scientists believe that the school is an effective agent of political socialization (Dawson & Prewitt, 1969; Dowse & Hughes, 1972).

These claims resonate with my experience in Taiwan's public schools. Everyday, students participate in the ceremony of raising the national flag and singing the national anthem. Pictures of Sun Yat-sen (the ROC national father) and Chiang Kai-shek were hung in every classroom and teacher's office. Classes ranging from Chinese language to social studies to music were geared towards the development of student commitment to the recovery of the Chinese mainland and loyalty to President Chiang Kai-shek. Wilson's (1970) ethnographic work in Taiwan's elementary schools in the 1960s supports this view.

The purposes of citizenship education in the public school system are particularly salient in social studies curricula (Barth & Shermis, 1970; Jenness, 1990; Parker & Jarolimek, 1984). Parker and Jarolimek (1984) emphasized the critical role of social studies in the United States as designed "to cultivate individuals who are knowledgeable,

---

*wan dur-lih shier-jihn-hueih*, a Taiwanese independence association.

skillful, and committed to democratic values” (p. 11). Five general attributes of citizenship have been identified: a sense of identity, the enjoyment of certain rights, the fulfillment of corresponding obligations, a degree of interest and involvement in public affairs, and an acceptance of basic societal values (Cogan, 1998, pp. 2-3). A sense of national identity and patriotism is usually seen as an essential ingredient of citizenship (Cogan, 1998). Political attachment is generally seen as the basic foundation of individual political identity (Dawson & Prewitt, 1969). Since all citizens are members of a particular nation-state and all residents are subject to its jurisdiction, it is no wonder that a sense of belonging and loyalty to one’s country is seen as a fundamental attribute of citizenship.

Generally speaking, social studies includes history, geography, and civic education, all of which are closely relevant to the cultivation of a sense of national identity. For instance, Dewey (1966) argued that knowledge of the past is the key to understanding the present, including one’s present country (p. 251). How a nation is portrayed in its history textbooks is essential to the issue of national identity formation (Nash, Crabtree, & Dunn, 1998; Robbins, 1990). Therefore, every country is concerned with how its past is portrayed. Japan, for instance, since the 1960s, has witnessed a fierce debate over how to present the role of Japan in World War II in social studies textbooks. The Japanese government imposed censorship and approved only textbooks that played down Japanese responsibility for military aggression in the war of the Pacific. Some Japanese newspapers reported that the government forced textbook authors to replace a particular word meaning “aggression” with a more neutral term to describe Japan’s invasion of China in the 1930s. However, some Japanese historians have demanded the

revision of textbooks. It was not until 1994 that the Ministry of Education issued a new history curriculum that, for the first time, characterized the role of Japan as an aggressor in the war (Nash, Crabtree, & Dunn, 1998). In classrooms, Japanese teachers who tend to be in left wing culturally and politically do not avoid teaching students about the war; they teach students about the Japanese invasion, comfort women, and the Nanking massacre.<sup>10</sup>

Similarly, before the 1980s, history courses taught in the German Federal Republic rarely enlightened students about the Nazi period. However, by the mid-1980s, German scholars became engaged in a debate over the question of war guilt and the proper interpretation of Nazism (Nash, Crabtree, & Dunn, 1998).

Garcia-Ramon and Nogue-Font (1994) have argued that the teaching of geography is closely linked to the construction of national identity because knowledge of the geographical space of a country is considered necessary to “link an abstract idea (the nation) with a concrete and tangible reality, that is, the physical and spatial setting of the nation” (p. 207). This close link between social studies education and the formation of national identity appears to be universal. One of the major educational trends in African nations in the post-independence era, for example, focuses on the development of social studies curricula that is specifically intended to promote national identity (Merryfield &

---

<sup>10</sup> Nash and his colleagues (1998) stated that “Japanese teachers have generally sought to avoid detailed study of the events of the war and simply focused on postwar reconstruction and peace education” (p. 135). A Japanese professor visiting Michigan State University provided me with an alternative view: According to this scholar, many books or reports written by teachers themselves reveal that Japanese social studies teachers, particularly for teachers who are in left wing, teach students “how we invaded other countries and how terrible things we did” (cited from an e-mail sent by Aki Sakuma, 6/8/99).

Tlou, 1995). Social studies curricula in Hong Kong, to cite another example closer to home, was changed as a result of the transition from a British protectorate to part of mainland China. The intention was to highlight topics about the PRC and to promote affiliation with Chinese culture (Morris, Clelland, & Wong, 1997). Similarly, Taiwan's students learn about what is thought to be their "motherland" by studying a map of China, accounts of China's 5,000-year history, and about Chinese culture, all in their social studies classes.

Recent research on textbook content analysis in the social studies verifies the assumption that a major purpose of social studies curricula in Taiwan involves national identity formation (Dai, 1993; Ou, 1990; Shyr, 1993; Wu, 1994 a). For instance, Dai (1993) analyzed Taiwan history as it is taught in both elementary and middle schools and found that textbooks advocate the formation of a Chinese identity. Ou (1990) studied political themes in elementary school textbooks and found that textbook authors advocated a "great China" consciousness. All of them argued that Taiwan was portrayed as part of China -- culturally, ethnically, and politically -- in these textbooks.

#### **Putting the Pieces Together: An Inquiry into National Identity**

In sum, I am a Taiwanese teacher and citizen whose national identity has shifted over time. As my assumptions about my "nation" have shifted, I have found myself intrigued with related questions concerning teaching and the public school system. There is a lack of consensus about what nationhood is, or should be, in Taiwan -- in part because our national identity is shifting as we become more democratic and in part because general world views of China and Taiwan have also shifted. Furthermore, educators, as well as the general public, presume that schools -- especially social studies



classrooms -- play a role in the formation of students' national identities. As I embarked on this study, I was curious about what role schools were playing in the development of children's national identities and the factors that influenced that role. Thus, my overarching question was:

What is the role of schooling in the development of students' conceptions of their own national identity in Taiwan? More specifically, what role have social studies curricula -- both intended and enacted -- played in the development of national identity?

Clearly, one dissertation could not answer such large questions. My specific question was more narrow: "How does a social studies teacher's knowledge and political beliefs influence how she or he teaches national identity?"

Although my focus was placed on teachers' characteristics and their practice, a review of social studies curricula, past and present, was necessary for this study. One purpose of reviewing the history of social studies curricula is to understand the dynamic of national identity in shaping schooling in general and social studies curricula in particular in the past four decades in Taiwan. And, in turn, how schooling and social studies curricula have contributed to the development of Chinese identity in my informants when they were students. In addition, the examination of social studies curricula in a historical context provides an outline regarding curriculum change in recent decade as a response to Taiwan's democratization. To understand the current curriculum reform that the state expected of teachers, I also examine the current social studies curricula.

Nevertheless, only looking at the state-mandated curricula is insufficient for

understanding how citizenship education is actually carried out in classrooms. The work of researchers like Cohen (1990), Wilson (1990), and their colleagues, clearly shows that there is often disjunction between curricular policy and teachers' practice. Thus, I focus on teachers' classroom practice, their political orientations, their understanding of Taiwan history, and potential relationships among these three variables. In order to investigate these aspects of the schooling-national identity development relationship, I used these subsidiary questions to guide my inquiry:

1. How have state-developed elementary school social studies curricula changed over time? What is the relationship between those changes to Taiwan's national identity?
2. How What are teachers' political orientations and national identities? What do teachers know about Taiwan's history?
3. How do elementary school teachers teach the most recent state-developed social studies curriculum? Is there a relationship between their political orientation and their enactment of the curriculum? Is there a relationship between their knowledge of Taiwan's history and their enactment of the curriculum?

### **Overview of Chapters**

This dissertation is organized into seven chapters and an appendix in which I introduce my research design and methods. In Chapter One, I have attempted to provide readers with an overview of the evolution of my research questions. In Chapter Two, I provide an overview of Taiwan history, focusing on the Taiwanese people's search for identity and the KMT's emphasis of Chinese identity. Chapter Three is concerned with

Taiwan's educational system, including the centralized character of that system, the national curriculum, and social studies curricula in particular. I conclude that chapter with a comparative content analysis of two sets of textbooks. In Chapter Four, I describe three elementary school teachers, their political orientations, and their knowledge of Taiwan history. In Chapters Five and Six, I describe and explain their teaching of Taiwan history in further detail. In the final chapter, I discuss three challenges faced by teachers in Taiwan and the implications of the study for educating democratize citizens in Taiwan's particular context and for other contexts as well. I conclude this chapter with suggestions for how teacher education could help teachers to become informative intellectuals who are able to educate students to think critically instead of indoctrinating them.

## CHAPTER TWO

### TAIWAN: HISTORY

#### AND THE CONFLICTING VIEWS OF NATIONAL IDENTITY

There are two reasons for this chapter: to provide readers with some familiarity concerning Taiwan's history, the central subject matter of this dissertation, and to shed light on issues of national identity, since these are rooted in the country's history. The story that I tell is a broad-based chronological account of 400 years of Taiwan history.<sup>1</sup> While I cannot do justice to the subtleties and complexities of Taiwan history here, I do try to include most of the particulars that are relevant to understanding the independent status of Taiwan as an island, the political oppression of the Taiwanese people, and the struggles of the Taiwanese in seeking their own identity under various regimes.

#### **Some Background**

Taiwan is located in the western Pacific Ocean between Japan and the Philippines, straddling the Tropic of Cancer. It is separated from the Fukien Province of China by the

---

<sup>1</sup> My narrative is organized according to the political regimes that controlled Taiwan at different times. This organization offers readers a convenient way to study Taiwan. In addition, since this study is framed around politics and national identity, I chose the view of political history rather than social history. However, this method has two major disadvantages: it gives more weight to political history than social-oriented and cultural history and it emphasizes the Chinese Han-centered perspective while ignoring the Taiwanese aboriginal-tribes-centered perspective (Chou, 1998; Weng et al., 1992). Nevertheless, I select this organization to aid unfamiliar readers with a wealth of new information. It is important to note that in the context of this study I adopt the term "Taiwan history" or "Taiwan's history" instead of the term "Taiwanese history" to represent the history of the island of Taiwan and all of its different ethnic groups. Given the ideological significance of the term "Taiwanese," which is used to refer the ethnicity of Taiwanese people rather than the whole population of Taiwan, the term "Taiwanese history" may connote the history of Taiwanese people. Therefore, the use of the term "Taiwan history" is probably an acceptable way in this study, even it violates U. S.

Taiwan Strait, which is about 142 miles wide at its widest point and 90 miles at its narrowest. Taiwan is shaped like a leaf of tobacco or a yam. It is 240 miles long and 98 miles wide (The ROC Yearbook, 1991), approximately 13,800 square miles, roughly the size of Massachusetts, Connecticut, and Rhode Island combined (Ballantine, 1952).

With less than 22 million inhabitants in 1998, Taiwan's population is composed of four groups. Only 1.5 % are aboriginal tribes, who inhabited Taiwan prior to the Chinese immigration from the mainland which began three hundred years ago. Thirteen and a half percent of the inhabitants are "mainlanders" or what is called *waih-sheeng rern*. They are the Chinese who followed the KMT's retreat to Taiwan as a result of being defeated by the Chinese Communist Party in China in 1949. (Their offspring are also referred to as *waih-sheeng rern*). The biggest group -- around 85 % of the population -- is Taiwanese or *been-sheeng rern*, which means native Taiwanese.<sup>2</sup> *Been-sheeng rern* are composed of two groups: Hakka, whose ancestors came from China's Kwangtung Province, and Holo, whose ancestors came from China's Fukien Province. Hakka, Taiwanese, Mandarin (the national language in Taiwan), and the languages of aboriginal tribes are mutually incomprehensible.<sup>3</sup>

Taiwan's history is highly controversial. Some Chinese nationalists in Taiwan

---

linguistic convention.

<sup>2</sup> *Been-sheeng rern* (native Taiwanese) are distinguished from *waih-sheeng rern* (outsiders of the Taiwan Province) according to one's provincial origin. By the late 1980s, one of the greatest social cleavages in Taiwan had become *sheeng-jir wen-tir* or the problem of provincial origins. This problem involves the tension between native Taiwanese and mainlanders, the imbalance of political power between the groups, and their concomitant competing views of national identity. In broad strokes, mainlanders have supported unification with China; Taiwanese have supported independence (Shih, 1998; Wachman, 1994). I will explore this issue in greater length later in this chapter.

<sup>3</sup> There are nine aboriginal tribes and each has its own native language. These languages are also mutually incomprehensible.

and in the PRC claim that since “ancient times” Taiwan has been an integral part of China. They even claim that Taiwan’s aboriginal tribes originated from southern China (Weng, Shyue, Liu, & Sheen, 1992). However, other scholars suggest that the first Taiwanese residents were aboriginal tribes who were Malayo-Polynesians originating from what is now Malaya, Indonesia, and the Philippines (Hsieh, 1964; Lumley, 1976; Peng, 1972). According to Chinese chronicles, a few Chinese expeditions came to Taiwan between the 7<sup>th</sup> and 14<sup>th</sup> centuries, but these expeditions made no effort to establish permanent settlements (Ballantine, 1952). Serious immigration from the Chinese mainland began only around 1600 (Lai, Myers, & Wei, 1991).

Taiwan was first known to the western world as *Ilha Formosa* (literally, a beautiful island), a name given to the island by Portuguese navigators in 1590 (Hsieh, 1964). During the 17<sup>th</sup> century, the Dutch and the Spanish ruled northern and southern Taiwan respectively. The Spaniards took the northern cape of the island, naming it Santiago. Approximating the pronunciation of this word, the name of this cape is now *San Tiao Ko* (Hsieh, 1964). The Spanish also established settlements in northern Taiwan but they were eventually expelled by the Dutch. The Dutch created the first government of Taiwan in 1624, and established Fort Zeelandia at today’s Tainan City in southern Taiwan. During this period, the Ming authority on mainland China (1368-1644) expressed no concern since they believed that Taiwan lay beyond the borders of Imperial Chinese territory (Kerr, 1974).

During the era of Dutch rule (1624-1662), the Dutch established Taiwan as its colony, controlling its markets and trade with Japan and China. They also used the island to produce farm and deerskin exports. To improve the efficiency of farming, the Dutch

purchased cattle in India and brought them to the island. They lent land, money, and cattle to Chinese immigrants to cultivate the farms and raise rice, sugar cane, wheat, and tobacco. With the encouragement of the Dutch, more Chinese immigrants continued to move to the island. The Dutch also did extensive missionary work, establishing schools in aboriginal villages for teaching the Bible and converting aborigines (Hsieh, 1964; Weng et al., 1992). Over the course of their rule, the Dutch did make some contributions toward Taiwan's development, especially in terms of recruiting Chinese immigrants and cultivating agriculture (Weng et al., 1992).

As a typical colonial government, however, the Dutch also imposed high taxes on lands, a head tax on each inhabitant of a certain age, and other numerous taxes and levies on fishing, hunting, and internal trade (Hsieh, 1964; Tsurumi, 1977). There was much friction between the Dutch and Chinese immigrants, and, in 1652, a large scale Chinese uprising challenged Dutch control. Chinese unrest continued throughout the remaining years of Dutch rule (Tsurumi, 1977)

### **The Cheng Kingdom (1662-1683)**

The Chinese officially established Taiwan as a miniature Chinese imperial court in 1662 with Cheng Cheng-kung (known as Koxinga to Western historians), a loyalist of the Ming dynasty (1368-1644). Cheng Cheng-kung left the Fukien Province and landed on Taiwan as a result of his failed attempt to defeat the Manchu Ching dynasty (1644-1911). Cheng ousted the Dutch and established Taiwan as a military base from which he hoped to recover the Ming dynasty (Cohen, 1988).<sup>4</sup> During the Cheng Kingdom, more

---

<sup>4</sup> School history concerning Cheng Cheng-kung stresses his loyalty to the Ming emperor and his vow to "counterattack the Ching dynasty and restore the Ming dynasty." However, some historians hold an alternative view, arguing that when

Chinese settlers emigrated from coastal provinces -- especially Fukien and Kwangtung -- to Taiwan.

Cheng Cheng-kung died one year after his arrival in Taiwan and his son continued to rule Taiwan for 21 years. Cheng Cheng-kung has become a national hero to Chinese nationalists both in Taiwan and the PRC. Taiwanese textbooks refer to Cheng Cheng-kung as a Chinese national hero.<sup>5</sup>

Seen from the Chinese nationalist's perspective, the Cheng family's merits included recovering Taiwan from Dutch's hands and establishing the foundations for Chinese life on the island. Two of Cheng's policies in particular are noted for their contributions to Taiwan's development. First, Cheng designed a military farming camp system under which soldiers farmed in their spare time to support themselves. Through this system, Cheng extended the scope of cultivated lands. Second, Cheng established

---

Cheng Cheng-kung conquered Taiwan and set up Taiwan as an eastern capital (which implied that Taiwan was a sovereign state with no connection to the Chinese Ming dynasty), Cheng Cheng-kung made efforts to establish his own kingdom rather than to maintain loyalty to the Ming dynasty (Croizier, 1977; Wu, 1994 a).

There are some interesting parallels between the Koxinga period (1662-1683) and Taiwan under the rule of KMT (Chinese Nationalist Party, Koumington in Chinese). Both governments claimed to represent mainland regimes and were enemies of the new governments on the mainland. In addition, just as Chiang Kai-shek brought supporters from the mainland to rule the native populations in Taiwan, Koxinga brought former Ming subjects, scholars, and farmers to rule the Chinese settlers who had lived in Taiwan during the Dutch rule.

<sup>5</sup> The story of Cheng Cheng-kung as a national hero has been shaped to meet different political purposes in different environments. After the Japanese invasion of China in the 1930s, the ruling KMT used Cheng Cheng-kung as a symbol of Chinese nationalism, hoping to inspire Chinese resistance to Japan. The KMT in Taiwan also used Cheng Cheng-kung as hero. Cheng Cheng-kung's commitment to "counterattacking the Ching dynasty and restoring the Ming dynasty" was a refrain heard when the KMT proposed to "counterattack the Chinese Communist Party and to recover the mainland." The PRC also uses Cheng Cheng-kung: to the PRC, Cheng Cheng-kung is a hero who expelled the Dutch, liberating the Chinese settlers on Taiwan (Chen, 1996).



schools<sup>6</sup> and built a Confucian Temple to advocate Confucianism (Tsurumi, 1977).

Other policies promoted industries such as sugar refining and salt production.

Meanwhile, brisk trade was carried on with Japan, the Philippines, and other neighboring areas (Hsieh, 1964).

While Cheng Cheng-kung is generally seen as a hero, his rule was nevertheless controversial. An alternative view claims that Cheng family rule subjected Chinese immigrants on Taiwan to another form of colonial life (Su, 1986). One historian who interprets Cheng family rule as colonial rule, commented:

[The Cheng family] donned the colonialist mantle of the Dutch, especially in terms of their relationship to the land. Likewise, when it came to exploiting and keeping in bondage the settlers and pioneers, their methods were in no way inferior to those of the Dutch. (Su, 1986, p. 21)

Other descriptions of the Cheng family noted its severity. The island was governed by martial law. Rulers levied various taxes on people who owned land, houses, boats, ponds, fishing nets, cattle, mills, and other properties. A poll tax was also collected for everyone who reached the age of ten years old and this was applied not only to Chinese settlers but also aborigines (Hsieh, 1964). One Chinese traveler reported that the taxes were so onerous that some people sold their daughters to pay them (Hsu, 1980).

In 1683, a rebel force, led by Shih Lunng,<sup>7</sup> attacked Taiwan and eliminated the Cheng family. Taiwan then came under the rule of the Ching dynasty as a part of the

---

<sup>6</sup> There is some disagreement about the purpose of schooling. Some historians argue that the schools were established at this time only for elites who were qualified to sit for civil service examination conducted by the government (Wu, 1994 a).

<sup>7</sup> Shih Lunng is a controversial figure for Chinese nationalists in both Taiwan and China. In Taiwan's schools, students learn that Shih Lunng was immoral, both for his rebellion and his invasion. Recently, PRC historians have constructed a new interpretation of Shih Lunng's role. From the PRC's perspective of the desirability of Chinese reunification, Shih Lunng is seen as a national hero who fought for the unification (Chen, 1996).

Fukien Province.

### **The Era of Ching Dynasty Rule (1684-1894)**

Initially, the Ching emperor and most officials did not want to incorporate Taiwan as part of their territory. Some Ching officials argued for abandoning Taiwan for three reasons: (1) Taiwan was a wilderness and, from the beginning, never a part of the Chinese domain; (2) Taiwan was an isolated island, seen as unworthy of defending; and (3) Taiwan was a haven for criminals and pirates (Su, 1986, p. 22).<sup>4</sup> However, Shih Lunng wrote a memorandum titled A Discussion on the Advantages and Disadvantages of Abandoning Taiwan to the Ching emperor, arguing that Taiwan ought to be incorporated as a part of China due to its importance for national defense (Lee, 1996). The Ching emperor was eventually persuaded and Taiwan subsequently became a part of China for the first time.

Ching's rule of Taiwan for the next two centuries was marked by a deterioration in the efficiency of administration (Ballantine, 1952). All high ranking officials in charge of the administration of Taiwan were assigned by Chinese Ching officials. These officials stayed in Taiwan for only for periods of three years; afterwards, other officials were assigned. With this rule, Ching officials employed various practices of exportation of money and neglected the measures for developing the well-being of the people on this island (Ballantine, 1952; Chang, 1970; Gold, 1986).

The Ching government feared that rebels might use Taiwan as a base to attack the dynasty. For almost 200 years, immigration from Taiwan was banned. However, people from Fukien and Kwangtung (mainly single men), sometimes risked their lives and illegally crossed the Taiwan Strait to the island, seeking a better life (Cohen, 1988; Lee

& Liu, 1996). Due in part to an increasing numbers of immigrants into Taiwan, farming lands extended into the northern part of the island. During Ching rule, there was a dramatic change in the land system, enhancing the extension of farming lands. All the official and military farms that were previously controlled by the Cheng family were released to ordinary people and lands were privatized. There developed a new land system which included three classes of farm people: landowners, tenants, and small farmers. Agriculture greatly improved (Hsieh, 1964).

Meanwhile, tensions and conflicts between Chinese settlers and aboriginal tribes increased. Some Chinese settlers had married women from Taiwanese aboriginal tribes who lived in the western and northern plains. As a result, some lands owned by aboriginal tribes were shifted to the hands of Chinese settlers (Chou, 1998). Although Ching officials drew lines prohibiting Chinese settlers from claiming the aboriginal tribes' homelands, many Chinese Han people crossed those lines and occupied aboriginal lands (Chou, 1998).

Tensions and conflicts also existed among Chinese settlers themselves, who were divided into major groups based on their home origins, languages, and cultures. The majority were Holo, Fukien emigrants, who had settled on the western plains, as well as along the coast. The second significant group, who occupied the less productive foothills, was comprised of the Hakka. There was much tension between Hakka and Holo and they frequently fought (Weng, 1991; Yin, 1994).

Throughout the period of Ching rule, Taiwan was an unstable society, with "a minor revolt approximately every three years and a major one around every five years" (Gold, 1986, p. 25). The revolts involved peasant uprisings; they were not independence

movements dedicated to escaping Ching rule (Mendel, 1970).

It was not until 1874 that the Ching started to manage Taiwan as an important stronghold that would be useful against Japanese and French invasion. After Taiwanese aborigines killed Japanese castaways in 1871, the Ching emperor assigned an official, Sheeng Bauu-jeng, to Taiwan to negotiate with Japan. Subsequently, the Ching dynasty canceled the emigration ban and made Taiwan a military base. In 1886, Taiwan became a province of the territory of the Ching dynasty and Liu Ming-chuarn became the first Taiwanese governor, appointed for a period of six years. He moved the capital from Tainan to a relatively new city at that time, Taipei. He introduced the first small railway and telegraph systems, established cable connections overseas, and developed electricity in Taipei. Chinese nationalist historians believe that Liu and Sheeng made Taiwan the most modern and progressive province of all of the Chinese provinces<sup>8</sup> (Lai et al., 1991). Nevertheless, when the Japanese took over Taiwan nine years later, contemporary Japanese observers described Taiwan as follows:

Dirty water was rushing around the houses and some people lived together with dogs and pigs. Though there were public toilets (in Taipei), excrement was found everywhere. The inhabitants seemed to possess no knowledge of sanitation. A large number of prostitutes with advanced syphilis appeared around the city. Education lagged far behind. Pressed so hard to earn a living, they (Formosans) had no time for learning. Farmers and coolies did not receive even an elementary education; merchants could read and write, but their knowledge was limited to bookkeeping and business correspondence. Ninety per cent of males were completely illiterate, and female literacy was naturally lower. (Mendel, 1970, p. 17)

---

<sup>8</sup> The current textbook used in Taiwan stresses Lui's merits but does not mention other Ching officials' corruption and inefficiency. Sheeng Bauu-jeng and Liu Ming-chuarn administered Taiwan for 7 years. Interestingly, in the chapters on the Ching dynasty rule over Taiwan, more than two thirds of the space is used to introduce this administration to students. Chinese nationalists use this emphasis to strengthen the connection between Taiwan and China by stressing how Chinese Ching officials contributed to the development of Taiwan (Wu Mih-char, speech to study group, 11/23/1997).

In 1895, Taiwan was ceded to Japan by the Treaty of Simonoseki, which was signed after the defeat of China by Japan in the first Sino-Japanese War (1894-1895). Ching bureaucrats did not regret ceding Taiwan to Japan for, in their eyes, Taiwan was not worth keeping:

In Taiwan, the birds do not sing, the flowers are not fragrant; the men are heartless and the women faithless. Ceding it away would not be a pity at all. (Berman, 1992, p. 214)

### **The Era of Japanese Colonial Rule (1895-1945)**

Before Japan took over Taiwan, a short-lived Taiwan Republic was established by local officials and leaders in order to resist Japan. In its public statement, the Republic employed the term *tzyh-lih* (self-sustaining) and *tzyh-jyh* (self-governing) rather than *dur-lih* (independent), implying that the establishment of the Republic was to prevent Japanese rule and neutralize the domination of the Ching government. The Taiwan Republic did not want to be completely independent from China (Wu, 1996). Without an election, the Ching's governor of Taiwan, Tang Ching-sung, was recommended by local elites to be president of the Republic. However, a few days later, the President, along with his officials and troops -- of whom were from China -- took flight and Taipei was overrun by the Japanese within 24 hours. The Republic only existed for ten days (Wu, 1996). Guerrillas in southern Taiwan continued to resist Japan for four months but Japan successfully occupied the entire island by the end of October in 1895 (Mendel, 1970; Wu, 1996).

During the first two years of Japanese rule, a law allowed Taiwanese residents to decide to stay in Taiwan or return to China. Among the 2,800,000 Taiwanese residents at

that time, only 6,456 (.23%) left, returning to China (Dai, 1993). Some historians claim that by choosing to stay and become Japanese nationals, Taiwan was turning itself into an indigenous society (Dai, 1993; Lee, 1996 & Liu).

With the long term goal of colonizing Taiwan as a base to expand its power throughout southern Asia, Japan had a plan for developing the island: It would both supply Japan with agricultural products and become a market for Japanese exports (Ballantine, 1952; Hsieh, 1964). Unlike the Dutch, who colonized Taiwan mainly for the development of commercial profits, Japanese colonization was considered more political than commercial (Hsieh, 1964).

Political and administrative patterns under the Japanese were established by Law No. 63. The governor-general of Taiwan was the highest ranking administrator, with wide autonomous and autocratic powers, tightly controlling all levels of the government (Ballantine, 1952; Chou, 1998; Kerr, 1974; Lee, 1996 & Liu). According to the governor-general's provisional regulations, all orders issued by the governor-general (which totaled more than 526 regulations) were treated as authority equal to that of laws in the home country (Su, 1986). Police state politics played a fundamental role in the colonial rule of Taiwan. From the governor-general's Bureau for Police Affairs to local police dispatch points located in each local small village (and even in aboriginal tribes' residential areas deep in mountains), policemen controlled all Taiwanese -- their household affairs, registration, movement, travel, education, speech, payment of taxes -- sentencing them to hard labor, confiscating their land and forcing the sale of agriculture products (Su, 1986, p. 41).

In addition to political and military controls, the Japanese colonial government

controlled the rice and sugarcane industries and markets in Taiwan. The Taiwanese were constrained to do the work of farming, providing sugar and rice at cheap prices to Japan (Su, 1986).

There were 18 incidents of armed resistance uprisings against Japanese rulers from 1895 to 1915 (Mendel, 1970).<sup>9</sup> Uprisings did not get support from China and were not about Chinese nationalism. The armed rebels simply wanted to resist Japanese oppression and to protect the well being of the Taiwanese; they did not want to return to motherland China (Dai, 1993). One of the largest uprisings took place at the Jiau-baniarn, a small village in southern Taiwan, in 1915, which proved to be the last armed uprising led by Taiwanese peasants. The leader of the uprising formed a secret cult and persuaded many illiterate and superstitious peasants to believe that he had magic power and that he would become "the king of Taiwan," implying that he intended to expel Japan and build a new Taiwan (Dai, 1993). In addition to the slaughter of more than 1,000 Taiwanese during the uprising, 866 were condemned to death and 500 were sent to prison for long terms of hard labor (Kerr, 1974, p.112). The Japanese media spread word of this episode nationwide and Japanese opposition party leaders in Japan condemned the Japanese colonial government in Taiwan. Finally, Tokyo ordered the governor-general to commute the death warrants into sentences of life imprisonment after 95 Taiwanese had already been executed.

The last great uprising against Japanese oppression took place among an aboriginal tribe at Wuh-sheh in 1930. The causes of this uprising were complicated; one

---

<sup>9</sup> Taiwanese uprisings against Japanese colonial rule are centerpieces of history classes. Textbook authors praise the rebels as national heroes who dared to resist foreign oppression, partly to inspire Chinese nationalism (Weng et al., 1992).

involved a Japanese policy that exploited aboriginal labor and the fact that some Japanese police had married aboriginal women only to then abandon them (Chou, 1998). One hundred and thirty nine Japanese, including policemen, teachers, and officials, were killed by aborigines. This uprising was ruthlessly suppressed by Japanese authorities, leading to the murder of 644 tribesmen, including many innocent aboriginal women and children (Ballantine, 1952; Chou, 1998).

Between the 1920s and the 1930s, non-armed resistance of Taiwanese youth from upper-class families and intellectuals replaced the previous armed resistance. This non-armed resistance took the form of appeals to the Japanese emperor, advocating the Home Rule Movement. The leaders of the movement were Lin Hsien-tang and Tsai Pei-ho who made 15 annual petitions to the Japanese national Diet. The petitions demanded that Japan recognize Taiwanese interest at the national level in Tokyo. Lin Hsieh-tang expressed clearly that his followers were loyal to Japan and did not use the petitions in an attempt to make Taiwan independent (Kerr, 1974).

In order to inculcate Taiwanese consciousness in the island's youth, members of the Home Rule Movement established the Cultural Association in 1921. The Association sponsored lectures, meetings, and seminars throughout the island. At the beginning, the government cracked down the Association, arresting Association members only to release them soon afterwards as the Tokyo press reported the Movement and the government in Taiwan did not want to incite protests from Tokyo (Dai, 1987). The Association published a newspaper and formed the Mass Popular Party (Lin, 1993; Mendel, 1970). However, the governor-general continued to crack down at various times. And, 8 years later, little had changed. A professor at Tokyo University noted:



"The governor-general is a totalitarian tyrant and the Taiwanese do not enjoy any political freedoms" (Yin, 1994, p. 381).

By 1934, due to the emergence of differences in political ideology among members of the Movement (some espousing Communism and some wanting to maintain a connection with the KMT in China), the Movement had ended, fulfilling only part of its purpose (Lin, 1993; Mendel, 1970). By the end of the 1930s, Taiwanese rights to participate in politics were still limited. A small number of prominent Taiwanese civilians were appointed as members of the Advisory Council, which served largely as window dressing. Locally, the provincial and district assemblies were opened up to Taiwanese participation but in all except one of the municipal assemblies, Japanese members far outnumbered Taiwanese members (Ballantine, 1952). Until the 1940s, citizens who were qualified to vote were limited to male subjects of at least 25 years of age who paid local taxes of 15 yen or more annually (Ballantine, 1952; Yin, 1994).

Despite authoritarian rule, however, throughout the first 40 years of Japanese rule, Japanese rulers did not employ an intensive cultural assimilation program or interfere with Taiwanese cultural activities (Chang, 1997). For example, the most popular local theater -- *Gezaixi* (which is performed in Taiwanese) -- was developed during that time by farmers and laborers at I-lan, a small farming town in eastern Taiwan (Chang, 1997).

But Japanese rulers had reversed their policy of cultural toleration by the 1930s when Japanese-Chinese relations deteriorated and Japan feared a Taiwanese revolt. Authorities adopted the policy of Japanization, the *huarng-min huah* movement, a movement to make the Taiwanese loyal subjects of the Japanese emperor. The policy encouraged all residents to speak Japanese in public and discouraged the use of native



tongues. After 1937, newspapers could only be published in Japanese. And the Taiwanese were forced to give up their Chinese names and adopt Japanese family names, religion, and life styles.

Although Japanese authorities made efforts to turn the Taiwanese into loyal Japanese, Japanese rulers did not really treat Taiwanese as equal Japanese citizens. All Chinese residents of Taiwan were labeled as “islanders” (*been-daau-rern*) rather than Japanese (Hughes, 1997). Islanders were discriminated against politically, culturally, and socially. For instance, the Japanese had maintained separate primary schools for children of Japanese colonials. The best schools above primary school levels were kept for Japanese children, with a few positions were left for islander children who came from wealthy and elite families and who could get special permission from the governor (Ballantine, 1952; Peng, 1972). Taiwanese numbers were also limited in the universities and they were only allowed to enroll in the medical program. In 1939, there were only 90 Taiwanese students in universities (Ballantine, 1952).

Several scholars have contended that Japanese rule on Taiwan appeared to have had both bad and good features (Ballantine, 1952). In the 50 years of Japanese rule, Taiwan was transformed into a modern society and the standard of life enhanced. Japanese rule was more efficient than that of the other colonials such as the British and the French (Hsieh, 1964). To carry out their plans of making Taiwan an agricultural and industrial center, Japanese colonials paid close attention to the island’s development. In the first decade of Japanese rule, they established a careful census of demography and customs with respect to both Taiwanese and aboriginal lives. They regularized the system of land rights and established farmer associations. New irrigation systems were

established as early as 1907, balancing the water supply. They reconstructed the old 62-mile-long railroad built by Liu Ming-chuan and then built a railroad, 250 miles long, connecting Keelung on the northern coast with Kaohsiung on the southern. They also built a mountain railroad on Ali mountain that is still used today. Twenty five hundred miles of highway were constructed, connecting cities and towns across the island. Cheap hydroelectric power was also developed and agriculture production in rice and sugar were greatly expanded (Hsieh, 1964). In addition to the establishment of infrastructure needed in the modern society, Japanese introduced a modern educational system to Taiwan since 1898. The purposes of education were to "keep order, to exploit the island's economic resources, and to enlist cooperation from the islanders" (Tsurumi, 1977, p. 2). The 6-year common school course consisted of ethics, Japanese language, classical Chinese (composition, reading, calligraphy), arithmetic, music, and gymnastics (Tsurumi, 1977) and the percentage of Taiwanese school-aged children enrolled in elementary schools raised from 2.04 to 71.31 during 1898 to 1944 (Tsurumi, 1977, p. 148). Beyond common schools, medicine schools, two-and three-year lower level vocational schools, and normal schools were established. However, Japanese rulers did not concerned to provide Taiwanese youth with secondary and higher education, believing that secondary education was preparing their Japanese students for a higher education that most of Taiwanese students would never receive.

All of this activity provided a foundation for the development of a sense of Taiwanese identity, one that was distinct from a Chinese identity. As Mendel (1970) noted:

The half-century of Japanese rule had prepared the ground for a genuine sense of national unity. It had provided the first effective island-wide administration,

substituted comparative modern education for old superstitions, cut off most ties with mainland China, raised living standards far above those on the turbulent Asian continent, and encouraged a cash crop economy, with per capita foreign trade 10 times greater than China's and higher than that in Japan itself (p. 25)

During the Japanese occupation, island residents (composed of fragmented ethnic groups) developed a shared identity (Dai, 1993; Hughes, 1997; Lai et al., 1991). Although this shared identity had not yet become a "national identity" (Hughes, 1997; Yin, 1994), the sense of a us-as-a-group was growing strong among Taiwanese, expressed by the term *been-sheeng rern*, which was contrasted with *waih-sheeng rern* in the era of KMT rule.

### **The Era of KMT Rule (1945 to the present)**

Taiwan's return to China (the ROC) was decided by the Allied Powers, represented by Roosevelt, Churchill, and Chiang Kai-shek in Cairo Declaration of 1943. "All of the territories Japan had stolen from the Chinese, such as Manchuria, Formosa, and the Pescadores, shall be returned to the Republic of China" (Ballantine, 1952, p. 53).<sup>10</sup> Without being so much as consulted, Taiwan was transferred into the hands of the Republic of China in 1945.

---

<sup>10</sup> Legally, the Cairo Declaration was mere propaganda, not a legal document. A formal international contract, the San Francisco Treaty (signed by the ROC and Japan in 1951), specified that due to its defeat in World War II, Japan should give up all claims to Formosa and the Pescadores. But the Treaty did not provide for a transfer of sovereignty to China. On the basis of the San Francisco Treaty, several scholars argue that the issue of Taiwan's national status is still controversial (Cohen, 1988; Huang & Peng, 1995; Peng, 1972).

## **The 2/28 Incident**<sup>11</sup>

Japan surrendered to the Allies in August of 1945; the ROC government took over Taiwan in September of that same year. Chen Yi was appointed to be the first governor of Taiwan in 1945.<sup>12</sup> Many Taiwanese welcomed the arrival of the Chinese government with enthusiasm. When Chen Yi arrived in Taiwan, the Taiwanese warmly welcomed the new Chinese government. A large crowd of elders and youth gathered and applauded, lining both sides of the road from the airport to the governor's office. In addition, on the day of the arrival of the Chinese, the Taiwanese voluntarily flew the ROC's national flag to celebrate return to the motherland. Nevertheless, only six months later, a slogan "Dogs go and pigs come!" was scrawled everywhere on Taipei's walls (Kerr, 1965), revealing the hostility of the Taiwanese towards the new government.<sup>13</sup>

---

<sup>11</sup> The "2/28 incident" (scholars also use the terms "uprising" or "massacre" to name this event) is named because this event took place on the 28<sup>th</sup> of February in 1947. Discussing this event has been politically taboo for the past four decades. People who grew up at that time did not dare to mention it to their children or discuss it in public. Textbooks and academic research did not mention it. An association composed of scholars, historians, and family members of victims of the incident was established in 1987. They demanded the right to read the documents and secret files kept by the ruling KMT and urged the government to apologize for the massacre. At the present time, books about the incident (such as memoirs of witnesses and original copies of historical materials) are allowed to be published. In a new middle school history textbook, the incident is introduced to students with 13 lines of text.

<sup>12</sup> One of the reasons for appointing lieutenant general Chen Yi was because the KMT leadership considered him a "Japanese expert," who could facilitate a smooth transfer of the administration of Taiwan from Japanese hands. In addition, Chen Yi had a good relationship with Chiang Kai-shek (the president of the ROC from 1947 to his death in 1975). They shared the same provincial origin, Chekiang, and both graduated from the same Japanese military school. In May of 1947, due to his misrule of Taiwan, the ROC central government in the capital city, Nanking, changed his position from that of Taiwan's governor-general to that of governor of the Chekiang Province. In 1949, he was arrested and executed, accused of intending to turn Chekiang Province over to the Communists (Chen, 1991; Lai et al., 1991; Lumley, 1976).

<sup>13</sup> Chen Yi looked like a pig: short and fat, beady-eyed with heavy jowls. The term "pig" was also used as an analogy for mainlander officials to describe their corruption

When the KMT central government decided to take over Taiwan, Chen Yi insisted that Taiwan needed a special administrative system:

The Taiwanese are different from other Chinese on the mainland; they have been ruled by Japan for 50 years and, thus, they need a centralized administrative system, which would be a more effective means for bringing Taiwan in as a province of China (the ROC). (Tarn, 1947, p. 25)

The administrative structure adopted in Taiwan in 1945 was not substantively different from what existed under Japanese colonial rule (Hughes, 1997; Kerr, 1965; Lai et al., 1991; Mendel, 1970; Tarn, 1947). The governor-general held ultimate power over executive, legislative, judiciary, and military decisions. He also appointed all district chiefs, city mayors, and heads of government agencies. Mainlanders were assigned to all the official positions. In addition, the prevailing corruption among mainlander officials became a norm in Taiwan. The economy began to deteriorate and, beginning in 1946, Taiwan experienced shortages of rice and sugar for the first time. Chen Yi sought to resolve these economic problems by establishing a Monopoly Bureau to control the sale of rice, sugar, alcohol, camphor, and tobacco. However, this monopoly worsened the economy further and the Taiwanese lived in misery, suffering from unemployment and inflation (Mendel, 1970).

On the evening of February 27, 1947, agents of the Tobacco and Wine Monopoly Bureau and four policemen checked unlicensed vendors for cigarettes. They caught a widow, confiscated her cigarettes, and hit her on the head with a pistol when she begged them not to confiscate her money and tobacco. When people nearby attempted to help

---

and greed. After the 2/28 incident, the Taiwanese adopted the term “Chinese pigs” as an expression of their hostility toward mainlanders. During my childhood in the 1960s, I often heard my grandparents and neighbors call mainlanders whom they disliked “Chinese pigs.”

the woman, the policemen fired several shots into the crowd, killing one person. A crowd gathered at the office of *Tai-wan shin-sheng-pao* (The Taiwan New Life Daily), demanding that this incident be reported. The chief editor told them that the government's Propaganda Commission had just ordered him not to report the incident. The people took to the streets, moving on to Military Police Headquarters and the Taipei Police Bureau, demanding that the guilty police be severely punished.

On the morning of the next day, February 28, people gathered again, some shouting: "Self-rule!" Some wrote a slogan in Japanese: "Down with the military tyranny!" (Lai et al., 1991). At noon, protesters took over a radio station, spreading the news of a street demonstration. When people gathered at Chen Yi's office, Chen's policemen arrived and fired into the crowd, killing two more people and injuring several others. Protesters got angrier and started to beat mainlanders who were walking in the streets. The anger spread to every city on the island. On the evening of that same day, Chen Yi declared martial law. Policemen and soldiers patrolled the streets, shooting pedestrians.

A Settlement Committee was subsequently formed, made up of Taiwanese elites, intellectuals, and politicians, who wanted to peacefully negotiate with the government to resolve the incident and reform the policies which were responsible for the disturbance. The reform proposal made by the Committee included immediate local elections, the abolition of irresponsible police units, the appointment of more Taiwanese to higher positions of policy making, and the breakup of economic monopolies (Mendel, 1970). Chen Yi pretended to accept the requests and promised to ask the national government for its opinion in Nanking. Instead, however, he used the first week in March to identify



the activists supporting the uprising and he filed a report to Chiang Kai-shek describing the incident as a “rebellion” that required a military crackdown (Chen, 1991; Kerr 1965; Mendel, 1970). On March 8, Chinese troops sent by Chiang Kai-shek arrived at Keelung Harbor in northern Taiwan:

Soldiers on deck had begun to strafe the shoreline and docking area, even before the ships had reached the pier. As the Nationalist troops came ashore, they moved out quickly through the streets of Keelung, shooting and bayoneting men and boys, raping women. Some Formosans were seized and stuffed alive into burlap bags found piled up at the doors of sugar warehouses, and were then simply tossed into the harbor. (Peng, 1972, p. 69)

Further brutal killings of innocent Taiwanese followed. Politicians, members of the Settlement Committee, journalists, teachers, students, and many others were arrested and executed in secret in the four months that followed. The precise number of victims is not known; estimates range between ten and twenty thousands.

Chen Yi's oppressive administration of Taiwan was the primary cause of the 2/28 incident (Kerr, 1965; Lai et al., 1991; Mendel, 1970; Tarn, 1947). Since the 1950s, the ruling KMT has interpreted the incident by adopting the view of Chiang Kai-shek, Chen Yi, and the other mainlanders officials. They accused the leaders of the “riots” of being “Communists” and “people spoiled by the Japanese.” However, the Taiwanese who witnessed the incident disagreed and the incident continues to be seen as among the most dramatic in Taiwanese history, a symbol of the Taiwanese as victims and serving to remind islanders of the wounds left by the history of colonization by outsiders (Edmondson, 1996). Moreover, the bitterness caused by the incident “nourished an emerging movement which sought to overthrow the ROC and turn Taiwan into an independent nation” (Lai et al., 1991, p. 183) and contributed to the formation of a strong sense of Taiwanese identity. Hughes (1997) claims that the incident was “the most

significant formative experience in preventing the consolidation of a Chinese national identity for the island” (p. 26).

Two years later, in October of 1949, the KMT government was defeated by the Chinese Communist Party. The ROC central government and two million people (including high-ranking officials, troops, scholars, businessmen, students, and teachers) retreated to Taiwan, joining the six million local Taiwanese. The ROC has continued to claim to be the legitimate government of China -- a claim that has had a considerable impact on issues of national identity in Taiwan. I now briefly discuss the establishment of the ROC, its founder's political ideology, and its political structure, which continue to be significant features of the ROC on Taiwan.

### **The Establishment of the ROC and Its Failure in China (1912-1949)**

Overthrowing the Manchu Ching dynasty, the ROC was established by the KMT in 1912. The ROC's victory depended heavily on Chinese Han nationalism which was in opposition to the “barbarian rulers,” the Manchus who had established the Ching dynasty. Called barbarians by the Han because they lived in northern China (outside of the Great Wall) and did not share the Han language or culture, the Manchus were seen as outsiders. Beginning in 1842, the Ching empire faced a series of internal uprisings and threats from external imperialism, often appearing unable to protect its national interests. Sun Yat-sen, the founder of the KMT and of the ROC, used the situation to incite the Chinese Han people to the “exclusion of the Manchus, restoring the rule of Chinese rulers, the establishment of a republic, and the equalization of land rights” (Schiffrin, 1968, p. 358).

Sun's revolution created the Republic of China in 1912. However, the new republic suffered intense power struggles among warlords; in addition, externally, a



variety of unequal treaties with foreign powers that had been signed under the Ching dynasty continued to exploit the nation's economic interests. Sun Yat-sen created a political doctrine, *Sam-ming juu-yih* (the Three Principles of the People), to inspire national unity. These included the principle of Chinese Nationalism to elevate China to an equal position among international powers; the principle of Democracy to improve political equality among the Chinese themselves; and the principle of Livelihood which called for the distribution of wealth in a more egalitarian fashion. With respect to Nationalism, Sun advocated an ethnic concept of national identity, which now serves as the basis for an ideology of pan-Chinese identity and the reunification of Taiwan with China (Hughes, 1997). Sun Yat-sen created *jung-huar ming-tzur*. A close but inadequate English translation would be "Chinese nation" or "Chinese race," mostly referring to "Chineseness" as an ethnic category (Chun, 1994; Juang, 1996). He claimed that there was a difference between the formation of *ming-tzur* (nationhood) and *guor-jia* (the state). According to Sun, a nation (*ming-tzur*, an ethnic category) is mostly formed by people who share the same ethnic bonds, culture, language, religion, and life-styles, while the formation of a state depends on military force (Sun, 1985). Sun Yat-sen stressed that among the components of nationhood, lineage was the most powerful. From this perspective, being Chinese is primarily a question of sharing common ancestors. The ancestor that Sun singled out as having special importance in this regard was *Huang-di* (Yellow Emperor), a figure in Chinese mythology. According to the legend, *Huang-di* was a leader of a tribe in northern China four thousand years ago. Textbooks used in Taiwanese schools refer to him as the common ancestor of all Chinese and claim that all Chinese are the descendants of *Huang-di*.

Sun then adopted an alternative interpretation concerning the formation of China. He stressed the idea that the Chinese nation-state (*jung-guor*) is only composed of a single nation (*ming-tzur*), *jung-huar ming-tzur*. This was in keeping with his idea of *guor-tzur juu-yih*, or the principle of nationality as equivalent to the doctrine of the state (Sun, 1985). He further explained that this idea was exclusively applicable in China, not in the West. According to Sun, since the Chin (221-207 B.C.) and Han dynasties (206 B.C.-7 A.D.), China had developed a single state out of a single race, while foreign countries had developed many states from one race or included many nationalities within one state (Sun, 1985). The term *jung-huar ming-tzur* (Chineseness as an ethnic category), therefore, was used in reference to *jung-guor rern* (the citizens of China). In so doing, the ROC claimed that there was no difference between *jung-guor* (the state of China) and *jung-huar ming-tzur* (the Chinese race or Chinese as an ethnic category). The ROC used both terms without making distinctions between them; for the ROC, *jung-guor*<sup>14</sup> and *jung-huar ming-tzur* (Chinese as an ethnic group) are synonymous. Moreover, Sun Yat-sen's Chinese nationalism defined national identity in terms of race, language, culture, and history, ostensibly shared by all Chinese. This ethnic concept of

---

<sup>14</sup> A close translation of *jung-guor* would be "a kingdom in the center of the world." This was the real meaning adopted by people who lived during the Chou dynasty (1122-249 B.C.). In ancient times, this term was used in contrast to barbarians. Barbarians did not live in *jung-guor*; they lived in the places surrounding *jung-gour*. People who lived in *jung-guor* were *huar-xia* people (they were civilized and recognized as the ancestors of the Chinese). For thousands of years, *jung-guor* was used as a geographical term, connoting high culture developed around the Yellow and Youngtzu Rivers. A variety of dynasties were established in *jung-guor*, including the Chin, Han, Tang, Sung, Yuarn, Ming, and Ching. However, no dynasty named their country *jung-guor* (Juang, 1996). As a result of the influence of the appearance of the modern concept of "the state" in Western society, the Chinese adopted the concept of "state" with the establishment of the ROC. The international community as well as the ROC leadership adopted the term China (*jung-guor*) in reference to the ROC.

national identity, originating with the KMT, continues to be used by the leadership of the PRC.

Sun Yat-sen designated three stages of nation building: (1) a military stage of national reconstruction under the KMT (at the time, the KMT only held Kwangtung Province); (2) a stage of political tutelage under the one-party dictatorship of the KMT; (3) a final stage of constitutional government (Sun, 1924). According to this design, the KMT was to be not only the founding party of the ROC but also the leader of the mission of nation building.

After the death of Sun Yat-sen in 1925, his successor, Chiang Kai-shek, defeated the warlords who opposed him, unifying China, organizing a national government, and moving on to the stage of political tutelage. In the years that followed, Chiang Kai-shek adopted Sun's ideology as the foundation of his government.

In 1930, Chiang Kai-shek started to "suppress bandits," a euphemism for his effort to crack down on the Chinese Communist Party (CCP).<sup>15</sup> When Japan invaded China in 1937, however, the KMT and the CCP cooperated and organized a united front to fight against Japan. Their resistance did not concern Taiwan.

Before 1942, the ROC leadership had never thought of recovering Taiwan from the Japanese. It was not until the advent of the Pacific Ocean War that Chiang Kai-shek suddenly realized that Taiwan held significant meaning for China and asserted that Taiwan should be an integral part of the fortress seen as essential for the nation's defense.

---

<sup>15</sup> The CCP was established in 1921. The CCP made it clear that it was their intention to overthrow the KMT government and to establish its own regime. The KMT called the CCP "bandits." Traditionally, Taiwan's textbooks referred to CCP members as *guhng-feen* (Communist bandits) and mainland China as "the area where the bandits lived." These terms were removed from textbooks in the early 1990s.

and security (Hughes, 1997).

Following the defeat of Japan in 1945, China's civil war ensued. The civil war continued until the defeat of the KMT government in 1949. U. S. delegations attempted to mediate negotiations between the CCP and the KMT. Several negotiating sessions were conducted under the mediation of these United States delegations but to no avail. Causes for the defeat of the KMT are complicated. The KMT blamed others for its failure: Japan's aggression that provided the CCP opportunities to better prepare itself to fight with the KMT afterwards; the American policy makers' blindness to the relationship between the CCP and Moscow; and, of course, the CCP's "rebellion." According to Barnett (1963), many of the most important causes of the KMT's defeat were military ones concerning inappropriate strategies and disastrous errors in military operations. In addition, an economic crisis involving runaway inflation created great instability and demoralization among the public and the KMT troops. The political disunity, corruption, and factionalism within the KMT also contributed to the speedy collapse of the KMT's regime on the mainland. Intellectuals, students, peasants, and workers became universally disaffected and drifted toward the CCP. Another cause was the fact that the 8-year Anti-Japanese War had a "shattering effect" on China and a process of social disintegration during this period began (Barnett, 1963, p. 8).

During the civil war, the U. S. threat to withdraw aid forced the KMT to create a democracy by adopting a constitution in 1947 and conducting national elections of representatives for the National Assembly,<sup>16</sup> the Legislative Yuan,<sup>17</sup> and Control Yuan.<sup>18</sup>

---

<sup>16</sup> According to the ROC Constitution, the National Assembly holds the power of amending the constitution, electing the president and the vice president, and voting on proposed constitutional amendments submitted by the Legislative Yuan by way of

At the time, the elections of representatives to these three Congresses of the government was problematic. During the elections of 1947 and 1948, a majority of the country was occupied by the CCP. The KMT simply nominated the deputies for those areas. There was no census data or electoral registers in many areas under KMT control (Hughes, 1997). However, the government claimed that more than 100 million people voted (Ballantine, 1952, p. 81). The result of the national elections was that KMT candidates won nearly all the seats in the three branches of Congress. Through an election in the National Assembly, Chiang Kai-shek became the first-term President of the Republic of China (Long, 1991).

The crisis of the civil war provided a context in which the KMT was able to legitimize its dictatorship as a single-party rule.<sup>19</sup> Due to the crises provoked by the civil war, the National Assembly adopted the law of “Temporary Provisions Effective during the Period of Communist Rebellion” in April of 1949. Under the Provisions, the president, who was also the chair of the KMT, controlled the government, thus melding the party and the state. The KMT became an extension of the state, using the government

---

referendum (the ROC Constitution, Article 27).

<sup>17</sup> This was the highest legislative organ of the state, mainly holding legislative and budgetary powers. In addition, it exercised a power of approval over the candidature of the Premier appointed by the President. The members of the Legislative Yuan were directly elected by the people, those in occupational groupings as well as Chinese overseas (the ROC Constitution, Article 62 and 64).

<sup>18</sup> The Control Yuan consisted of members elected by the Councils of Provinces and Chinese overseas. It exercised powers of consent, impeachment, censure, and auditing (The ROC Constitution, Article 90 and 91).

<sup>19</sup> Although there were the other three political parties on the mainland at that time - - the Young China Party, the China Democratic Socialists Party, and the Chinese Communist Party -- the three parties were not allowed to demonstrate their power on determining the content of the ROC Constitution. The representatives who participated in the constitutional conference were appointed by the KMT and the Constitution was made based on Sun Yat-sen’s political ideology (Hughes, 1997).



as the party's tool. The Provisions declared that the president could make emergency decisions needed to "keep the people and country safe." According to these special Provisions, the president had three powers that went beyond constitutional constraints (1) he could run for an unlimited number of terms; (2) he could create institutions to manage an emergency without the approval of the Legislative Yuan and Control Yuan and (3) he could declare the imposition of martial law after securing approval from the Legislative Yuan (Chiu, 1993; Cohen, 1988).

In December of 1949, the KMT government retreated to Taiwan and made Taipei its "temporary capital." From 1949 to the present, the ROC has continued to abide by its Constitution that legitimizes the ROC as the government representing all of China. After the KMT brought its political ideology of reunification to Taiwan.

### **1950s to 1960s: Counterattacking the Mainland and Saving *Turng-bau* (Sibling**

In March of 1950, Chiang Kai-shek<sup>21</sup> declared that his primary aim for his presidency was to "restore the Republic of China and to destroy international Communism" (Tsang, 1993, p. 48). The sentiment of his campaign was expressed in

---

<sup>20</sup> The KMT government prefers to use the term *turng-bau* (biological siblings) to address its citizens. The term was popular during World War II as a way to unify all Chinese in resisting Japan's invasion. After the KMT government moved to Taiwan, it became a norm for the KMT to address all Chinese in this way, even Taiwanese aborigines. This implied an ethnic concept of national identity, the idea that a country is made up of people who share the same blood and culture (Juang, 1996).

<sup>21</sup> Chiang Kai-shek always claimed that he was a revolutionary and successor of Sun Yat-sen and would accomplish the national founder's ideal of creating a unified China that was democratic, prosperous, and commanded international respect. A scholar who was a Chinese nationalist commented: "He was motivated not only by a hunger for power but also a sense of a mission" (Tsang, 1993, p. 49). Tsang (1993) also noted Chiang Kai-shek's determination to fight Communism was not only for China as a revolutionary and nationalistic mission but for the peace of the international community.

popular slogan, “Reconquer the mainland and save *turng-bau*” -- which was hung on walls of classrooms and posted in government offices, railroad stations, and other public places. Chiang Kai-shek announced a five-year plan to recover the mainland by force: “Preparation in the first year, operation in the second year, mopping up in the third year, and success in the fifth year” (Zhan, 1993, p. 18).

In reality, what happened in the years that followed? Taiwan was facing considerable hardship. The U. S. had withdrawn its assistance from the ROC and eliminated Taiwan and Korea from its defense plans (Fu, 1992).

The invasion of Korea by the CCP in June of 1950 changed all of this. President Truman realized that Taiwan was in a strategic location for blocking the Communist invasion of Asia (Lumley, 1976). Subsequently, Truman ordered the Seventh Fleet to prevent an attack on Taiwan and also forbade any attacks on the PRC by the KMT (Ballantine, 1952).

Truman’s policy was reinforced under President Eisenhower, who provided military and economic assistance to the KMT government but also did not intend to help KMT troops in any counterattack on the PRC (Fu, 1992). After the first crisis in the Taiwan Strait<sup>22</sup> in December of 1954, the United States signed the Mutual Defense Treaty, confirming its commitment to protect Taiwan’s security. The treaty also discouraged the ROC in its aspiration to retake China by force. A stipulation in the treaty noted that the agreement pertained only in the event of external armed attack; any

---

<sup>22</sup> During the 1950s, the PRC exercised its military muscle by trying to occupy Taiwan in 1954 and again in 1958. PRC troops attacked ROC troops guarding the front line on the Kinmen islands, which are located several miles off of the Fukien Province. Although the PRC’s advance failed, these crises raised the possibility that Taiwan was more likely to be invaded than to invade (Tsang, 1993).

military operation launched by the ROC government could not be undertaken without agreement on the part of the United States (Fu, 1992).

While Chiang Kai-shek gradually began to realize the difficulties inherent in trying to reconquer the mainland militarily, the rhetoric of returning to mainland China was a primary theme of his speeches and his government's propaganda (Tsang, 1993). In the early 1950s, the propaganda emphasized a full-scale military recovery; in the late 1950s, the KMT leadership increasingly laid greater emphasis on developing Taiwan into a model example of Sun Yat-sen's political doctrine in the hope of appealing to Chinese on the mainland. In other words, the policy of reconquering the mainland had, in effect, been transformed into a policy of recovering the mainland by political means rather than by armed force (Tsang, 1993).

Chiang's commitment to the recovery of the mainland served several purposes. It legitimized the role of the ROC as a state that claimed exclusive representation of the whole of China. It also legitimized the KMT's authoritarian rule over Taiwan (Hughes, 1997; Mendel, 1970; Tsang, 1993). The democracy that the Taiwanese people expected to develop did not materialize. By claiming Taiwan as a military base for recovering the mainland, the government limited people's political rights on the pretext that the war with the CCP was not over.

There are three aspects of KMT rule over the first two decades that are highly relevant to this study: the KMT's efforts to strengthen its political power as a one-party dictatorship, the economic development of Taiwan, and the implementation of a cultural policy that stressed Chinese culture, a national language, and Sun Yat-sen's political doctrine. These features play an important role in one's ability to grasp the emergence of

competing views of national identity over time, for these policies set the stage for the further emergence of political opposition.

### **One-Party Dictatorship**

Realizing that Taiwan was the ROC's last stand, Chiang Kai-shek, a very charismatic leader, decided to reorganize the KMT so that he could mobilize his followers and pursue his mission of the political unification of China. This was unlike the situation the KMT faced in China during the civil war when the KMT leaders and members had divided into factions. Over two million mainlanders were all refugees who survived the civil war and who were loyal followers of Chiang Kai-shek (who served as the ROC presidency from 1947 to 1975). Since the total population of mainlanders was less than the Taiwanese population, it was necessary for them to present a single front.

The structure of the KMT party was -- and remains -- highly centralized, with a hierarchy led by the chairman of the party (who is also the president of the ROC). The party has a close relation with the state; the chairman exercises his power by appointing key party officials to the government, military, and security posts. The KMT's power has influenced the entire state structure and society as a whole; it has even spread into politics at the local level (Tien, 1992).

The KMT has exercised considerable control over Taiwanese society. At the local level, KMT organizations parallel the state administration. For instance, each public school had an Office of the Party and the principal serves as the head of the KMT office. The KMT also established auxiliary organizations such as student youth corps, women's associations, farmers' associations, labor unions, and the commissar system in the military (Lu, 1991).

### **The Political System of the ROC on Taiwan**

Despite the fact that the ROC moved its seat of government to Taiwan in 1949, successive ROC governments have continuously claimed that ROC territory includes the mainland -- even the Republic of Mongolia -- and, accordingly, Taiwan is seen as a province of the ROC rather than the ROC. In other words, the ROC political system that previously applied to the whole of China was transplanted to Taiwan.

In addition to transplanting the structures of its political system, the representatives of the three organs of Congress -- the National Assembly, the Control Yuan, and the Legislative Yuan -- who had been elected in China also moved to Taiwan. Moreover, they had their terms in their representative offices extended. The KMT justified these extensions using the principle of constitutional rule. According to the Constitution, representatives should be elected to represent each province. Since the mainland was still controlled by the CCP, no reelection could be conducted until there was a return to the mainland. Thus, elected officials (representing their respective provinces) had to remain in office until the CCP was deposed.

At the local level, local self-government began in 1951.<sup>23</sup> Citizens were allowed to participate in local campaigns and elections. The KMT was also actively involved, however. For instance, the KMT looked for the best qualified people from the most popular local factions and nominated them as KMT candidates, hoping to recruit local politicians to support the KMT's programs (Chao & Myers, 1998). Under martial law,

---

<sup>23</sup> All mayors, county magistrates, city and county council members, and Taiwan provincial assembly members have been elected by the people since 1951. However, since the mid-1960s, the governor of Taiwan and the mayor of Taipei and Kaohsiung were appointed by the central government and not elected. It was not until the mid-1990s that elections for these officials were reinstated.

the formation of any new party to run in elections was illegal. Thus, local elections became one-party "competitions."

In the early 1950s, a program of land reform was initiated based on a program that had been designed by Sun Yat-sen. While the KMT controlled China, it had never implemented this policy, but Chiang Kai-shek revitalized it in the 1950s. The policy included three steps. The first step was a government-ordered reduction in the annual rent that tenant tillers had to pay to landlords from the usual 50% of the year's major crop to 37.5%. The second step involved the government selling public lands to tenant tillers at below market prices, allowing tenant tillers to pay in installments. The third step was called "land to tillers." At the beginning, the government established a regulation that each landlord was not allowed to keep more than 14 acres of dry land or 7 acres of paddy land. All excess lands were to be sold to the government; the government, in turn, would sell the lands to tenant tillers. When landlords sold their lands to the government, the purchase price was established by the government, two-and-a-half times the value of the average yearly main crop. But the government did not pay cash; instead, 30 % of the price was paid in government enterprise stocks and 70 % in land bonds (Hsieh, 1964).

This reform was successful, making the KMT highly popular in rural areas and consolidating the power of the KMT in the countryside (Hsiao, 1991; Hughes, 1997). Critics have suggested that political and social reasons -- rather than economic reasons -- drove the land reform (Hsiao, 1991). They claim that the KMT intentionally implemented the land reform to destroy the landlord class, who had traditionally been leaders, and replace the political power of that class with a new one of owner-cultivators. The successes of the land reform became a part of the elementary school curriculum with

stories describing grateful families who were indebted to the government for a better life.

In May of 1949, martial law was imposed in Taiwan in the name of national safety during the period of “Communist rebellion.” Under martial law, personal liberties were further limited or annulled, including the freedom of assembly, association, expression, and publication. In addition, strikes, demonstrations, and the formation of political parties were also suppressed (Cohen, 1988). The imposition of martial law created the era of “white terror,” a crackdown on dissenters. The Taiwan Garrison Command, Security Bureau, police, and military courts enforced compliance with martial law; they arrested, tried, imprisoned, or executed all individuals considered to be a threat to national security and public order. Newspapers and journals that reported the information, under the name of threatening to public order or the regime’s legitimacy, were forced to close. Lei Cheng, a mainlander intellectual, was one well-known victim. Lei Cheng attempted to form an opposition party; subsequently, the KMT government charged him with sedition for publicly speaking about the hopelessness of recovering the mainland, urging the United States to interfere in the internal affairs of the ROC, and promoting the hostility between Taiwanese and mainlanders. The case of Lei Cheng ended in a military court where he was sentenced to 10 years in prison (Chao & Myers, 1998).

In order to persuade the Taiwanese people that the ROC government was the legitimate representative of China, the KMT government made every effort to cultivate a Chinese identity among Taiwanese people. One such effort involved the design of an imagined national territory, China. In addition to this geographical map of the ROC, the streets of Taipei were renamed after places in China. Another effort involved the

mandating of a policy to maintain Mandarin as *Guor-yuu* (the national language). The media and schools were required to use only Mandarin. Students who spoke their mother tongues -- such as Hakka, Taiwanese, or aboriginal languages -- in school were issued warnings. The leader of each class was responsible for reporting to the teacher about the use of mother tongues among students when the teacher was not in the classroom. Some teachers imposed fines of 50 cents to one dollar (Taiwanese dollars) for every student who violated the rule. Speech contests in Mandarin were conducted in and out of schools. By law, TV programs that used Taiwanese as the primary language were limited to only one hour every evening.

Another effort involved adding a new subject to the school curriculum. By order of the Ministry of Education, studying the Three Principles of the People became a prerequisite for entrance into the university. When students studied in colleges, they had to take Sun's doctrine as one of their required courses. Sun's doctrine also became a part of the public service examinations and the tests for getting ROC permission to study abroad.

From the 1950s through the 1960s, Taiwan experienced dramatic changes both socially and economically. The KMT government inherited a strong foundation on which to build: Taiwan's industry had already been greatly developed during Japanese rule (Hsieh, 1964) and between 1951 and 1967, the ROC government received \$4.1 billion in assistance from the U. S (Berman. 1992, p. 207). The KMT's economic strategy involved a series of four-year economic plans. Initially the government encouraged the domestic production of substitutes for imported goods. Later, it shifted its focus to an export-oriented market. Taiwanese female laborers, most of them middle-



school graduates, contributed much to the rapid and sustained economic growth. Rural populations were attracted to urban areas in the hope of finding jobs in the manufacturing industries.

By the 1970s, Taiwan was gradually becoming both urbanized and industrialized. The 1961 per capita GNP was a mere US \$100; by 1970, it had increased fourfold to US \$400. By the late 1960s, one or more family members worked as factory workers or in skilled occupations (Hsiao, 1991). In 1968, a program of compulsory education was adopted and the majority of children in Taiwan were required to receive at least 9 years of schooling. Predictably, a middle class emerged, marking a new era of social change that would continue over the coming decades (Hsiao, 1991; Lu, 1991).

Throughout that time, as an island threatened by the PRC, Taiwan relied heavily on the good will of the United States to protect it from attack, all the while maintaining its international status as the sole representative of China. The international community labeled the KMT regime “free China” to distinguish it from the Communist regime on the mainland. However, by the 1970s during the Nixon administration, the U. S. gradually began to change its China policy, attempting to establish diplomatic connections to the PRC. By the 1980s, with the rise of new opposition forces, calls began to be heard for authentic democracy, challenging the legitimacy of the KMT’s claim as the government of China (Hughes, 1997; Wachman, 1994).

#### **Political Change During the Chiang Jing-kuo Era (1972-1988): Democratization and Taiwanization**

Taiwan in the 1970s was characterized by a series of serious setbacks in the government’s international status. The ROC had been a founding member of the United Nations. Between 1951 and 1960, the ROC and its allies -- especially the U. S. --

successfully blocked the PRC's entrance into the U.N., arguing that the PRC did not meet the prerequisite that U.N. members should be "peace-loving states." After 1961, support for the admission of the PRC increased. The United States adopted a new tactic to keep the ROC in the U.N., arguing that changing the representation of China should be considered an "important issue" that would require a two-thirds majority vote. However, in 1971, the General Assembly rejected the claim that the issue of Chinese representation was an "important issue." Rather than suffering the humiliation of expulsion from the U. N., the ROC delegation voluntarily "withdrew" before members voted to approve the PRC as the lawful representative of China in October of 1971 (Fu, 1992; Hickey, 1997). Since that time, the ROC has not been recognized as the sovereign state that represents China internationally.

At one point during the discussion, the U. S. suggested the possibility of a two China policy but the KMT government insisted on a "one China policy," rejecting the suggestion (Fu, 1992; Hickey, 1997). The KMT government continued to consider the ROC the sole legitimate representative of China. The government's objection was expressed by a slogan *han-tsei pu-liang-li*, which means "the rightful Chinese government definitely does not want to stand together with the band of rebels."<sup>24</sup>

In November of 1971, the PRC's Minister of Foreign Affairs delivered a speech at

---

<sup>24</sup> Dr. Chien-fu (the representative at the Coordinating Council for North American Affairs in Washington from 1982 to 1988 then Taiwan's Foreign Minister from 1993 to 1996) explained how the "one China policy" created a dilemma for the countries who wanted to keep "both Chinas" in the U.N.: "We (the ROC) took the same stand as mainland China. We (the ROC and the PRC) both said there was only one China. We both said Taiwan was part of China. And we said only the Republic of China is the legitimate government of China. They said only the People's Republic of China is the legitimate government of China. So, during this period we presented the world with a dilemma. They (the international community) had to make a choice. They can not do

the U.N. openly rebuking the U. S. for its “occupation of Taiwan and intervention in China’s sovereignty over Taiwan.” He also claimed that: “Taiwan is one of the provinces of China (the PRC) and the residents of Taiwan are our siblings, sharing with us the same flesh and blood” (Contemporary China Research Institute, 1972, p. 45).

In 1972, U. S. President Nixon issued the Shanghai Communiqué, which also expressed the view that there was only “one China.”<sup>25</sup> The U.S. acknowledged that:

... all Chinese on either side of the Taiwan Strait maintain there is but one China and that Taiwan is part of China. The United States government does not challenge that position. It reaffirms its interest in a peaceful settlement of the Taiwan question by the Chinese themselves. (Fu, 1992, p. 52)

In 1979, the Carter administration severed diplomatic relations with the ROC, recognizing “the People’s Republic of China as the sole legal government of China” (Fu, 1992, p. 55). As a result, the treaty of mutual defense established between Taiwan and the U. S. in 1958 was canceled. Since then, the Taiwan Relations Act has defined the U. S. relationship with Taiwan. The Act has enabled the U. S. to continue selling arms to Taiwan and to take actions to help Taiwan defend itself from any attack by the PRC (Chao & Myers, 1998; Fu, 1992).

As a result, the ROC government has found itself continuously excluded from international activities. Throughout the 1970s, the ROC suffered a series of diplomatic setbacks. It was expelled from several international organizations, even organizations not related to politics. When the ROC was allowed to participate in some international activities, the Taipei government was required to change its national name. For instance, in the 1976 Olympics, the ROC was forced to change its official name to “Chinese,

---

both; they have to do either/or” (Hickey, 1997, p. 1033).

<sup>25</sup> In this Communiqué, the U. S. avoided referring to Taiwan as part of the PRC.

Taipei”(*Jung-huar, Taipei*) (Moody, 1991).<sup>26</sup> In response, the ROC government adopted strategies to overcome its international isolation. It won support from some small states, retained its memberships in some international organizations, and promoted the maintenance of “substantive” relations (e.g., economic and cultural links) with a large number of countries that have chosen to recognize the PRC (Fu, 1992).

Paralleling the external challenge to the KMT government’s legitimacy in representing China, the internal challenge of political opposition -- *Dang-waih* (outsiders of the KMT) and then the Democratic Progressive Party also arose. Starting in the late 1970s, the struggle for democratization aided by the opposition went hand-in-hand with the movement for Taiwanese independence (Hughes, 1997; Wachman, 1994). The role of the opposition in Taiwan’s democratization is significant for “the opposition was the catalyst for putting the reform agenda in motion” (Hood, 1997, p. xii). I first describe how the KMT carried out political reform concerning Taiwanization and democratization in this section. The role of opposition who voices of Taiwanese independence and Taiwan’s democratization will be further investigated.

### **Taiwanization**

In 1972, the eldest son of Chiang Kai-shek -- Chiang Ching-kuo -- became the premier of the ROC.<sup>27</sup> In response to the degeneration of diplomatic relations, the new

---

Rather, the Communiqué left the definition of “China” to the Chinese to decide.

<sup>26</sup> Taiwan was offered a choice of names: China, Taiwan; China, Taipei; Chinese, Taiwan; Chinese, Taipei. The ROC government chose the term “Chinese, Taipei” for several reasons, including the fact that ROC authorities wanted to avoid the use of the word “Taiwan” which might connote Taiwanese independence (Moody, 1991).

<sup>27</sup> Prior to his duties as the premier, Chiang Ching-kuo (1910-1988) was in control of Taiwan’s internal security and eliminated opposition leaders. From 1965 to 1972, he served as the minister of defense; from 1972 to 1978, he was the premier of the ROC. After his father’s death, he served as the president of the ROC (1978 to 1988).

premier adopted measures to fortify internal solidarity. One measure was called "Taiwanization," a process of recruiting Taiwanese into the KMT and the central government (Nathan & Ho, 1993). For the first time since the KMT took over Taiwan, the governor and 5 out of 17 cabinet members were Taiwan-born. Prior to 1972, only three Taiwanese had ever served as cabinet members (Tien, 1988). Although they were awarded less important positions (e.g., internal affairs and transportation) and the most important positions (e. g., foreign affairs, military, national defense, and security agencies) were still dominated by mainlanders, the tendency toward Taiwanization was pronounced. In 1987, Taiwanese were appointed presidents of the Judicial Yuan and the Control Yuan. These two seats had been previously dominated by mainlanders. In 1988, Taiwanese members in the KMT Central Standing Committee (the Party's decision-making body under the leadership of the KMT chairman) grew to 16 out of 31 members (Tien, 1988)

By the end of the 1970s, approximately seventy percent of the KMT's membership were Taiwanese and fifty percent of government officials were Taiwanese. By providing more channels for Taiwanese to enter national politics, the KMT hoped to win Taiwanese loyalty to the regime and promote ethnic harmony. Most importantly, the policy of Taiwanization would help to link the interests of the Taiwanese more closely to the KMT (Tien, 1992).

In 1984, when Chiang Ching-kuo's health rapidly deteriorated, he appointed Lee Teng-hui, a native son of Taiwanese who had been a university professor, as the vice president and his successor.<sup>28</sup> Political observers had assumed that Chiang Ching-kuo

---

<sup>28</sup> Lee Teng-hui, a Cornell University Ph.D. and a former National Taiwan University

would choose his premier, Sun Yun-suan, a mainlander, as his vice president. However, he carefully kept the identity of his chosen successor a secret until the KMT's Central Committee had nominated him as the KMT's presidential candidate. At that time, Chiang Ching-kuo announced that he was nominating Lee Teng-hui as his vice president. For Chiang Ching-kuo, there were good reasons for choosing a Taiwanese as the vice president and his successor. The new party leader would have to be able to deal with both external threats to Taiwan's security from the PRC and internal threats from Taiwanese nationalists, who were mainly Taiwanese and sought to overthrow the KMT and ROC. Taiwanese leaders would be in a better position to thwart these attempts (Chao & Myers, 1998).

Chiang Ching-kuo also redefined the meaning of being "Taiwanese." He openly claimed that after residing in Taiwan for 40 years, he himself had become one of the *Taiwan rern* (Taiwanese). In the face of the emergence of Taiwanese nationalists in the 1980s, Chiang Ching-kuo intended to convince the Taiwanese that there is no distinction between Taiwanese and Chinese and that all residents of Taiwan should be considered "Taiwanese" (Moody, 1991). Recall that, traditionally, Taiwanese refers solely to *been sheeng rern* -- the descendants of Chinese settlers who came to Taiwan between the 17<sup>th</sup> and 19<sup>th</sup> centuries.

At the same time that he was promoting the Taiwanization of the KMT, Chiang Ching-kuo did not surrender his Chinese identity or the mission of recovering the mainland. In the presence the Legislative Yuan in September of 1975, for example, he

---

professor, served as an advisor for the ROC government on granting loans to several African states in the early 1970s. The KMT appointed him mayor of Taipei from 1978 to 1981 and later governor of Taiwan province.

declared that:

To save our country and our people, we must propagate the spirit of sharing a single boat. We truly believe in President Chiang's [Kai-shek] great hope to restore our Chinese culture, carry out the Three Principles of the People, vigorously practice democracy, and recover the Chinese mainland. (Chao & Myers, 1998, p. 111)

In 1979, Chiang Ching-kuo reiterated the theme of Chinese reunification with a new slogan: *san-ming Jun-yih tuung-yi jung-gour* (reunification of China under the Three Principles of the People). The slogan was meant to communicate his belief that the only way to deal with the Communists was to, first, promote democracy and prosperity in Taiwan based on the Three Principles of the People and, second, to transfer Taiwan's democratic experience to the Chinese mainland (Chiang, 1980; Chao & Myers, 1998). Given his strong Chinese identity, it is not surprising that Chiang Ching-kuo condemned Taiwanese independence activists as people who "forgot their origins" and who would create chaos:

The action to make an independent Taiwan is a rebellion against the whole of the Chinese nation. There is no reason to assert Taiwanese independence because historically and culturally Taiwan has been a part of China and the Chinese on Taiwan and on the mainland share the same blood from the same ancestors. Any Chinese patriots have a right to accuse Taiwanese independence activists of forgetting their origins. It is possible that they may be used by Communists to overthrow the ROC government and create chaos in our society. To keep our society stable and peaceful, it is one of our party's basic policies to eradicate any actions that advocate Taiwan's independence. (Chiang, 1980, p. 98)

### **Democratization**

In addition to trends towards Taiwanization, political change in Taiwan during the 1980s was characterized by increasing democratization. By 1984, the process of Taiwanization had helped transform Taiwan from a "hard" authoritarian state into a "soft" one. Winckler (1984), in explaining the movement from hard to soft

authoritarianism, focused on two issues: institutionalization and participation. He described a process of change from “mainlander-technocratic rule under one-man dictatorship” to “joint mainlander-Taiwanese technocratic rule under collective party leadership” (p. 482).

Nevertheless, the limited Taiwanization of the KMT meant that Taiwan was still not a fully democratic society where people enjoyed full freedoms and civil rights, such as organizing political parties and civic associations, demonstrations, or publishing newspapers and magazines without censorship.<sup>29</sup> In an interview with a West German journalist in 1983, when asked why the ROC had retained martial law so long, Chiang Ching-kuo explained that the ROC had to maintain martial law because it allowed the Taiwanese people to maintain their security, peace, and happiness (Chao & Myers, 1998).

The drive toward democratization emerged only in Chiang Ching-kuo’s later years. On March 21, 1984, after Chiang Ching-kuo nominated Lee Teng-hui as his vice president, Chiang Ching-kuo visited Lee’s office. In that meeting, Chiang Ching-kuo revealed his intentions to carry out major political reforms and he expected Lee to play an

---

<sup>29</sup> Two forms of censorship remained: content censorship and a variety of prohibitions on newspaper publication. One case of content censorship that was reported in a 1962 literary journal involved a writer of a poem who mentioned “a lonely old man on an island.” The writer was sentenced to a 20-year prison term because the government considered this poem to represent an obvious allusion to Chiang Kai-shek’s exile on Taiwan (Berman, 1992). In addition, there were prohibitions that restricted the publication of newspapers. The first restriction limited the number of newspapers, which was fixed at 31. All applications for registration of new newspapers were rejected. The second restriction concerned page limit. The limit was increased to two sheets (8 pages) in 1958, two-and-half (ten pages) in 1967, three sheets (12 pages) in 1974, and five sheets (20 pages) in 1988. In addition, the restrictions included the limitation of locations for a newspaper’s printing facility to the vicinity of its intended area of distribution. Finally, the price of all newspapers was mandated by the government. Censors insisted that they were protecting the country and its people against the falsehoods that served to advance Communist propaganda and threatened national security and social stability (Berman,



important role and continue those efforts when the President was gone (Chao & Myers, 1998). In December 1985, Chiang Ching-kuo, who was 76 years old and had long suffered from diabetes, publicly noted that he had never considered that he might be succeeded by any member of his family nor by a military regime (Chou & Nathan, 1987). In March 1986, Chiang Ching-kuo's plan for reform became clear and was put on the table. At the KMT's 12<sup>th</sup> Central Committee meeting in March 1986, Chiang Ching-kuo reminded the delegates (who were conservatives and controlled the ideological, military, and security sectors) of the party's long-standing goal of implementing constitutional democracy. He claimed that the time had come to push Taiwan's political development towards this goal. In April of 1986, he then created a 12-member committee with conservative and liberal, mainland and Taiwanese members and charged it in the development of the reform agenda. In June, the team submitted a six point reform proposal: (1) to conduct a large-scale supplementary election to the central representative organs (the Legislative and Control Yuans and the National Assembly) in order to address the problem of the deaths of members;<sup>30</sup> (2) to put local self-government on a legal basis;<sup>31</sup> (3) to simplify the national security law;<sup>32</sup> (4) to provide a legal basis for

---

1992; Cohen, 1988).

<sup>30</sup> According to the Temporary Provision, the representatives elected in 1947 on the mainland were not reelected in Taiwan. By the 1980s, they were in their 70s or 80s. Some of them were already dead and it was predictable that, in a short time, the rest would die. Filling the vacancies presented a problem for the government.

<sup>31</sup> Local self-government was carried out under an administrative order rather than a law. The establishment of the law of local self-government would provide for direct popular elections of the Taiwan provincial governor and mayors of Taipei and Kaohsiung. These officials had been appointed by the central government because the KMT feared that direct election would create popularly elected rivals to the KMT.

<sup>32</sup> Under martial law, the government issued many security orders, some overlapping with the provisions of regular law.

the formation of new civic associations;<sup>33</sup> (5) to strengthen public order; and (6) to strengthen party functions (Chou & Nathan, 1987, p. 286).

Chiang Ching-kuo then asked the committee to first work out a more detailed proposal on the third and fourth items, which pertained to abolishing martial law and revising the civic association law (Chou & Nathan, 1987).

While the KMT worked on these reforms, the opposition announced the formation of the Democratic Progressive Party (DPP) in September 1986.<sup>34</sup> The government declared it illegal but did not crack down on the new party.<sup>35</sup> In July of 1987, the 40-year-old martial law was formally lifted and the freedom to organize civic organizations (including political parties) was granted; the rights to demonstrations, free speech, and newspaper publishing were also restored. Nevertheless, a new Civic Organization Law was passed which prohibited all new civic organizations from advocating Communism and secessionist moves (such as Taiwanese independence) (Halbeisen, 1993). In 1987, the Emergence Decree, which had suspended the normal functioning of the Constitution since 1948, was repealed and replaced with a new National Security Law. In January 1988, Chiang Ching-kuo died and his vice president, Lee Teng-hui, became president.

The primary cause for Chiang Ching-kuo's willingness to democratize Taiwan rested on his intention to use Taiwan's democracy to force the democratization of China.

---

<sup>33</sup> The formation of new civic associations had been banned under martial law.

<sup>34</sup> The opposition emerged in the late 1970s, calling for democratization as well as Taiwanese independence. In 1986, Chiang Ching-kuo's health continued to worsen and the succession issue might have played a role in pushing the opposition to establish its own party while Chiang Ching-kuo was still alive. For the opposition, it was hard to know how the KMT authorities in the post-Chiang Ching-kuo era would react if they established a party (Nathan & Ho, 1993).

<sup>35</sup> In September of 1986, Chiang Ching-kuo informally informed the leaders of the opposition that the government would not take any action to arrest them if they went

He believed that the KMT would eventually recover the mainland through political means. In an interview with a German reporter in 1979, he said:

The late President Chiang (Kai-shek) used to say that recovering the mainland depended on “70 % political, 30 % military.” . . . . We are going to use our achievement in building a democratic and free society on Taiwan based on the Three Principles of the People to exert a strong political influence on Chinese people on the mainland. . . . So long as our actions (in recovering the mainland) receive the warm support of the mainland compatriots, they won’t lead to a world war. (Nathan & Ho, 1993, p. 39)

In October of 1988, Chiang Ching-kuo explained why Taiwan needed to abolish martial law. He candidly stated that the purpose of abolishing martial law was to affect China’s politics:

Abolishing the emergency decrees serves the purpose of speeding up democratic progress here. We must serve as a beacon light for the hopes of one billion Chinese so that they will want to emulate our political system. (Nathan & Ho, 1993, p. 39).

Some researchers argue that in the process of political reform, the political leader often plays the most important role (Nathan & Ho, 1993; Tien, 1993). However, other researchers believe that other factors are more significant than the role played by an individual political leader (Chao & Myers, 1998; Cheng, 1989). In the case of Taiwan, these factors include: (1) U. S. concerns about human rights in Taiwan; (2) the PRC’s continuing pressure on Taipei to negotiate by using the “one China, two systems” formula;<sup>36</sup> and (3) the challenge of the opposition, *Dang-waih*, to organize a political party (Chao & Myers, 1998, p. 120). It is difficult to determine precisely which factors were the most influential (Nathan & Ho, 1993). Chao and Myers (1998), however, argue

---

ahead with their new party (Domes, 1993).

<sup>36</sup> The PRC intended to use the “one China, two systems” formula to reunify China. Under this system, Taiwan would be a province of the PRC but would be allowed to keep its own social, economic, and political systems (Moody, 1991).

that the greatest pressure came from the opposition.

During Chiang Ching-kuo's presidency, Taiwan's economic achievements were described as a "miracle" (Gold, 1986). Taiwan's economic "miracle" could be summed up as "growth and stability" in the growth of GNP and industrialization in the 1970s and 1980s. As an island lacking in natural resources, it was considered a miracle that the GNP growth rates averaged 8.7 percent from 1953 to 1982 and that foreign reserves grew from US \$7 billion in 1980 to US \$15.7 billion in August 1984 (Gold, 1986). As the society became more prosperous, people demanded more opportunities to participate in domestic politics and became increasingly concerned with Taiwan's future. A total of 17 social movements, ranging from consumers' movements, farmer and labor movements, minority movements, and a women's movement, emerged in the 1980s. Protesters took to the streets to make their claims heard (Hsiao, 1991).

### **The Emergence and Growth of the Democratic Progressive Party (DPP):**

#### **1970s-1980s**

The political opposition played a very significant role in Taiwan's political development. In particular, the opposition called for a Taiwanese identity that would compete with the Chinese nationalism of the ruling party. Although the DPP (and its Taiwanese identity movement) emerged in the 1980s, their origins were rooted in the first two decades of KMT rule.

### **Taiwanese Nationalists**

Prior to the emergence of the opposition in the late 1970s, there were earlier Taiwanese nationalists overseas. These nationalists were either Taiwanese exiles after the 2/28 incident who fled to Japan or the U. S., or students who went abroad to study

and remained there. These Taiwanese nationalists established a variety of associations in Japan and the United States.<sup>37</sup> These groups questioned the myth of the Chinese nationalists that “Taiwan has been part of China since ancient times” and claimed that Taiwan had its own distinct history and culture (Cohen, 1988; Fu, 1992).

Taiwanese nationalists believe that the Taiwanese people have different historical memories from those of the Chinese who either live on mainland China or arrived in Taiwan in 1949. Initially, these Taiwanese nationalists defined “Taiwanese people” on the basis of ancestral origin; that is, the “Taiwanese” were people whose ancestors emigrated to Taiwan in the 17<sup>th</sup> century. Thus, in the early stages of the formation of Taiwanese nationalism, Taiwanese nationalists excluded mainlanders from the category of Taiwanese people. However, during the mid-1970s, Taiwanese nationalists redefined the meaning of being “Taiwanese” as those people who subjectively identify Taiwan as their sole motherland. This idea plays down the ancestral origins and emphasizes a subjective attachment to Taiwan (Huang, 1994).

The KMT government security agencies maintained a list of overseas Taiwanese independence activists. Blacklisted by the KMT, Taiwanese nationalists were exiles and ex-patriots. Although they could not directly participate in the Taiwanese independence movement at home, these exiles passed on their ideal of Taiwanese nation-building through their publications. Their message appealed to many Taiwanese students who went abroad to study.

The 2/28 incident and the era of “white terror” that followed left many Taiwanese

---

<sup>37</sup> One of them is the Washington D.C.-based Formosan Association for Public Affairs. Its purpose is to influence the U. S government to support human rights, democracy, and self-rule on Taiwan (Cohen, 1988).

people apolitical, for politics were seen as dangerous (Gold, 1986; Wachman, 1994).<sup>38</sup> Only a few dissidents dared risk their lives to criticize the KMT's authoritarianism and its illusion of "recovering the mainland." Yet the Taiwanese nationalists firmly believed that Taiwan should be democratized and turn itself into a sovereign state. In 1962, for example, Shie Ming-te, a 23 year-old student in the military academy was sentenced to life in prison for sedition because of his involvement with the Taiwanese Independence League.<sup>39</sup>

Perhaps the most famous case of advocating Taiwanese independence occurred in the 1960s. The chairman of the department of politics at National Taiwan University, Dr. Peng Ming-min,<sup>40</sup> wrote the Declaration of Taiwanese Self-Salvation.<sup>41</sup> Peng sent the Declaration to a local printer. When the printer discovered that it was a political announcement urging people to unite against the KMT, he informed the police. Peng and

---

<sup>38</sup> Parents of Taiwanese origin at that time were the generation who witnessed the 2/28 incident and they believed that involvement in politics was dangerous. They warned their children not to get involved in any political activities and not to criticize the KMT government (particularly, the propagandistic policy of recovering the mainland) and Chiang Kai-shek. It was well known that on university campuses "professional students" hired by the KMT investigated students and professors regarding their loyalty to the KMT government and reported to the KMT authorities. Having been raised in such climate, the youth generally appeared indifferent toward politics.

<sup>39</sup> Shie Ming-te is a life-long Taiwanese nationalist. With an amnesty, his sentence was reduced to 15 years. In 1977, Shie Ming-te was released and he continued to participate in the opposition movement. In 1980, he was again sentenced to life in prison for sedition because he was the chief organizer of a human rights rally known as the Kaohsiung incident or *mei-li-dau* (Formosa) incident.

<sup>40</sup> Born to rich Taiwanese parents in 1923, Peng Ming-min did his undergraduate work at Japan's Tokyo Imperial University during World War II and then at the National Taiwan University when the war ended. After obtaining a Master's degree in law at McGill University, he received a Ph. D. from the University of Paris. His specialty was international aviation law.

<sup>41</sup> The Declaration, written in 1964, was never made public in Taiwan but a copy was smuggled out of Taiwan and published in English by overseas Taiwanese independence organizations (Mendel, 1970; Peng, 1972).

his two fellow-defendants, former students, were immediately arrested. Peng was sentenced to 8 years and his students were sentenced to 10 and 8 years respectively. Chiang Ching-kuo pardoned Peng once he confessed that he was wrong. He was subsequently released.

In the Declaration, Peng Ming-min challenged Chiang Kai-shek's one China policy. He believed that the KMT's propaganda of regaining the mainland was impossible, because China had already found its own self-respect as a sovereign state. He asserted that people on Taiwan, regardless of their birth place, should work together to rewrite the Constitution to enforce true democracy and to establish a new country (Mendel, 1970; Peng).

In 1967, Peng found himself implicated in a rumor regarding an uprising. In 1969, through the help of Amnesty International, Peng fled to the United States and he was invited to do research at the University of Michigan. During his stay in the U.S., he wrote his autobiography, *Tzyh-your de tzy-weih (A Taste of Freedom)*, in which he makes a comprehensive argument for Taiwanese independence and which has served as an ideological foundation for contemporary Taiwanese nationalists.

In his argument, Peng makes three central points. First, adopting an alternative historical perspective, he distinguishes the people on Taiwan from *jung-guor rern* (citizens of the PRC) given their different historical experiences. Taiwanese ancestors began migrating to the island almost 400 years ago. Then, when the Japanese colonized Taiwan for 50 years, they cut off all contact between Taiwan and the Chinese mainland. After 1945, over two million mainlanders retreated to Taiwan, further shaping the distinctiveness of the Taiwanese. Peng argued that these events led to the development

of a distinct Taiwanese personality and identity which was quite different from that of the Chinese (Peng, 1972).

Second, Peng opposed the notion that the ethnic nation and the state should be seen as congruent. It is possible, he argued, that one ethnic nation exists in different countries and a country contains a variety of ethnic nations. Thus, he rejected the notion that any single Han descendant, no matter where they lived geographically, should be under Chinese rule:

I asked the Chinese to distinguish between ethnic origin, culture, and language on the one hand, and politics and law, on the other, and to abandon the idea that those who are ethnically, culturally, and linguistically Chinese must be politically and legally Chinese as well . . . I wanted the Chinese to understand that one can be proud of his Chinese ethnic and cultural heritage and still wish to be politically and legally separate from China, in the same way as General Dwight D. Eisenhower, who was proud of his German ancestry, was not considered a traitor because he led the Allied armies against Germany. (Peng, 1972, p. 245)

Third, Peng argued for a civic concept of national identity, claiming that countries are formed by a deep sense of community and shared destiny, not necessarily by a common race, language, or culture. He asserted that the political community in Taiwan must include all ethnic groups living on the island.

The voices of Taiwanese nationalists like Peng were repressed by the KMT government until the late 1970s. This was especially true of the dissidents who called themselves *Dang-waih* (non-KMT politicians or outside of the party).

### **Opposition Magazines and *Dang-waih***

The *Dang-waih* were composed mainly of Taiwanese people, including both the younger generation who were educated under KMT rule after 1949 and the older generation who were adults when the KMT retreated to Taiwan. Many of them came from poor families in rural areas and many were well educated. Some of them were



former KMT members.

Due to the KMT ban on forming political parties, the *Dang-waih* used magazines to voice their calls for political reform and to convey their Taiwanese identity to the public. These magazines played an important role in both mobilizing voters and sustaining the opposition movement (Berman, 1992). The *Taiwan Political Review* (*tair-wan jehng-luhn*) established in 1975, was the first opposition magazine. This magazine directly challenged the KMT by raising issues which were taboo, such as criticizing the distribution of political power which was monopolized by mainlanders (Berman, 1992). As the *Review* gained popularity, the editors became bolder, digging into other taboo and controversial issues (e.g., representation in the three parliamentary bodies, where no one had been reelected since 1945, and the onset of martial law). Within a year, KMT authorities banned the magazine and imprisoned its editors for seditious behavior, labeling them Communists (Berman, 1992; Chao & Myers, 1998).<sup>42</sup>

Despite these political arrests, opposition magazines continued to be produced. As one was closed down, another would appear with a different name (Berman, 1992). The most famous opposition magazine was *Mei-li-dau* (*Formosa*). It was very popular and sold over 100,000 copies of each issue. *Mei-li-dau* reiterated the popular arguments concerning democratization. In one article, the author complained that the KMT always closed magazines by claiming that the editors were Communists. In another article, an author called for the complete reform of the first National Assembly because it did not represent Taiwan. Another article questioned the KMT's policy about who could and

---

<sup>42</sup> In the case of *tair-wan jehng-luhn* (*Political Review*), the KMT imprisoned several editors. One *Review* writer, Huang-hua, was sentenced to prison for 10 years because he criticized Taiwan's political system and expressed his opinions: "The fact that we still

could not organize political parties (Chao & Myers, 1998).

The *Dang-waih* did not only use *Mei-li-dau* to advocate the idea of political reform but also to mobilize supporters and politicians. In order to compete with the KMT's power and promote their organization, *Dang-waih*, the *Mei-li-dau* organizers hosted 14 political gatherings and established 11 *Formosa* service offices between August and December of 1979. Clearly, the purpose of producing the magazine *Mei-li-dau* was “not for the magazine's sake but to develop an organization to recruit supporters” (Berman, 1992, p. 188) and to “organize a political party without a name” (Shih, 1988, p. 52).

*Mei-li-dau* was only published for four months. It was banned after the *Mei-li-dau* incident (also known as Kaohsiung event). When the *Dang-waih* hosted a rally on International Human Rights Day in Kaohsiung, the biggest city in southern Taiwan, in December of 1979, the government sent police to “keep order.” How the rally ended as a riot is still a controversial issue. Military police launched tear gas into the crowd which soon became a mob armed with wooden clubs and bricks, which attacked the military police (Chao & Myers, 1998). Newspapers and televisions reported how the mob attacked the military police and how the military police did not strike back. The government was portrayed as the protector of social order, while the opposition was portrayed as the destroyer. Through the media, the government told the public that activists threatened both the social order and economic progress and, if successful, they would create a disaster in Taiwan, making Taiwan similar to the Republic of Korea (Chao & Myers, 1998). In contrast, an activist, Shih Ming-te (one of the organizers of the

---

dream about recovering the mainland is unrealistic” (Chao & Myers, 1998, p. 66).



rally) said: "If I must sit in jail for the rest of my life for this (rally) -- the beginning of the people's stand to directly resist their oppressors, and the end of the paralysis of fear -- I am willing!" (Shih, 1988, p. 4).

In March of 1980, the government arrested all of the staff of Mei-li-dau. A military trial was held in which the Mei-li-dau staff were accused of trying to overthrow the government. The magazine's publisher, Huang Hsin-chieh, was sentenced to 14 years in prison. The court sentenced the manager, Shih Ming-te, to life in prison and the other six staff members to 12 years each (Chao & Meyers, 1998).

After the Mei-li-dau incident, the number of opposition magazines increased. In response, the government exercised censorship, but in vain. Every time one magazine was suspended or banned, a new one appeared (Berman, 1992). Magazines like Forward (Chiarn-jihn), The Eighties (Ba-shyr niarn-daih), and Cultivate (Sheng-gen), raised many issues, including discussions of "the world's longest running martial law" (Berman, 1992, p. 193). Since discussions of Taiwanese independence were still taboo, authors discussed two competing "consciousnesses": *Tai-wan jier* (Taiwanese consciousness) versus *Jung-guor jier* (Chinese consciousness) to avoid the issue of national identity (Chen, 1988; Huang, 1986; Shih, 1988). But discussions of national identity began to surface, sometimes targeting the school curriculum:

Through elementary school to university, students are taught Chinese geography on the enormous Chinese continent and the 5,000 year Chinese history. Our teachers use the most outdated maps in the world to teach our children that the ROC's territory still includes the Chinese mainland and Mongolia. In addition, the ROC Yearbook published by the KMT government tells people that our country's population is estimated at over 1.17 billion, which includes the population of China. (Chen, 1988, pp. 54-55)



## **The Opposition and Election Campaigns**

*Dang-waih* (non-KMT members) participated in a series of elections in the 1970s through the 1980s. Because the media were completely controlled by the government, opposition candidates had to communicate their messages about Taiwanese democracy and the national status of Taiwan through campaign speeches. Opposition members began consolidating their power so as to be able to compete with the KMT. Subsequently, *Dang-waih* emerged as a major rival political force in Taiwan.

On the eve of the 1977 elections, a riot broke out in Chung-li. A crowd of almost 10,000 people attacked the police station and set fire to a police van because the public believed that the ruling party was attempting to manipulate the elections. This was the first riot in Taiwan in 30 years (Gold, 1986).

The elections for the Taiwan Provincial Assembly in November 1977 signaled a breakthrough for the *Dang-waih*. By campaigning cooperatively, *Dang-waih* members won 20 % of the magistrate posts and 27 % of the seats in Taiwan's Provincial Assembly (Laster, 1990). Both the Chung-li incident and the subsequent elections signaled a new era of social change for Taiwan (Gold, 1986).

Since 1977, Taiwanese citizens have enthusiastically participated in elections. The percentage of the population voting increased from 70.3 % in the 1972 election to 80.4 % in the 1977 elections (Domes, 1993). Crowds of people voluntarily attended meetings sponsored by opposition candidates where they mocked and attacked the KMT's "recovering China" and "10,000 year parliament" policies. People applauded, venting their dissatisfaction with existing politics.

During these campaigns, issues of democratization (e.g., the abolition of the



Temporary Provisions law and martial law and the reelection of the representatives of the three parliament bodies) were the focus of opposition members' attack on the KMT. Because the KMT government justified its authoritarianism by stressing the rhetoric of "recovering the mainland" and, traditionally, mainlanders dominated politics, opposition candidates called for Taiwan's democratization and demanded that the Taiwanese people became the masters of Taiwan.

Since the ruling party controlled both the media and many significant organizations, however, the *Dang-waih* opposition generally got only about 30% of the vote in the elections held in 1980, 1981, 1983, and 1985 (Chou & Nathan, 1987). Not surprisingly, supporters of the opposition candidates were Taiwanese (Wu, 1989: Wu, 1992 a; Wu, 1992 b).

In September of 1986, the members of *Dang-waih* formed a technically illegal political party, the Democratic Progressive Party (DPP). The party identified Taiwan as its motherland and, in an effort to symbolize this, the DPP designed its party flag with the island of Taiwan placed on the center of a white cross. In the 1986 elections, the DPP called for the recognition of the "right to self-determination" of Taiwan residents (Laster, 1990). Because advocating Taiwan independence was still illegal, this term "self-determination" was used to imply the development of an independent Taiwan. The government did not arrest any DPP leaders, but the KMT warned the public of the dangers of advocating self-determination. Borrowing the rhetoric of the PRC, the KMT government reminded the public that, according to the CCP's warning, once Taiwan declared itself to be independent, the CCP would initiate military attacks on Taiwan. Intellectuals and scholars who supported the KMT criticized the call for self-





determination as “separatism.” As was the case with previous elections, the DPP received only 22% of the vote while the KMT received 70%.

By the elections of 1989, however, the rise of the DPP had brought the issue of Taiwan’s independence out into the open (Hughes, 1997; Wachman, 1994). Despite legal constraints concerning public discussions of Taiwanese independence, thirty-two DPP candidates from its radical faction, New Tide, formed a New Nation Alliance, which openly adopted the slogan “New Country, New Constitution, New Government.” The DPP radicals demanded a new Constitution, claiming that the 1947 Constitution represented the whole of China and did not represent contemporary Taiwan. They described Taiwan’s position metaphorically as “a little child wearing oversized shoes” (Ts’ai & Myers, 1990, p. 360).

On the other hand, the DPP’s *Formosa* faction, composed of moderates, took a different position. For them, “self-determination” meant four things:

(1) . . . people on Taiwan have the right to determine their future relationship with China; (2) self-determination does not specifically suggest what that decision should be; (3) the people of Taiwan should be aware of and allowed to discuss their options for the future, whether it would be movement towards independence, unification, or something else; and (4) there was not an urgent need to decide on the self-determination issue. (Laster, 1990, p. 42)

Responding to the call for self-determination, the KMT general-secretary, Soong Chu-yu, argued that changing the nationalistic name of the ROC and abandoning its constitution would not fulfill the ROC’s mission of recovering China. Moreover, Taiwanese independence would invite Communist military aggression. He warned voters that supporting Taiwanese independence would “turn Taiwan into Beirut” (Ts’ai & Myers, 1990, p. 361).

The 1988 election formally triggered the debate over national identity among



people on Taiwan. After almost two decades of oppression, and the opposition's efforts of the 1970s and 1980s, an identity "split" emerged -- *tuung* (unification) versus *dur* (independence) -- among people on Taiwan (Wu, 1989). The issue of Taiwanese independence was at the heart of the power struggle between the KMT and the DPP, and it had a major impact on both the political and educational system in the 1990s.

### **Cultural Change**

In addition to the political debates of the two previous decades, Taiwan witnessed cultural changes in which a new grass-roots wave of Taiwanization emerged. This movement found expression in literature, popular music, languages, and scholarship on Taiwanese history.

Hsiang-tu wen-hsueh (Nativist literature). Cultural changes began with the emergence of a new literature, *hsiang-tu* (native soil) *wen-hsueh* (literature) in the mid-1970s. Writers who grew up in Taiwan argued that writers who possessed a Taiwanese consciousness could create vivid stories concerning people's lives on the island (Sung, 1988). This literature contained stories about ordinary people such as workers, farmers, and rural women; their dialogues were written in the Taiwanese language. The style -- as well as the content -- of these stories was noticeably different from works written by mainlanders, which were full of the nostalgia for life when they were on the Chinese mainland. Mainlander writers attacked the writers of *hsiang-tu* literature; they were concerned that it might pollute the thoughts of the young generations in much the same way as the literature created in the 1930s in the mainland.

Taiwanese popular music. University students in the 1970s liked to sing "campus folk songs." The lyrics were in Mandarin and most of them were popular in summer and



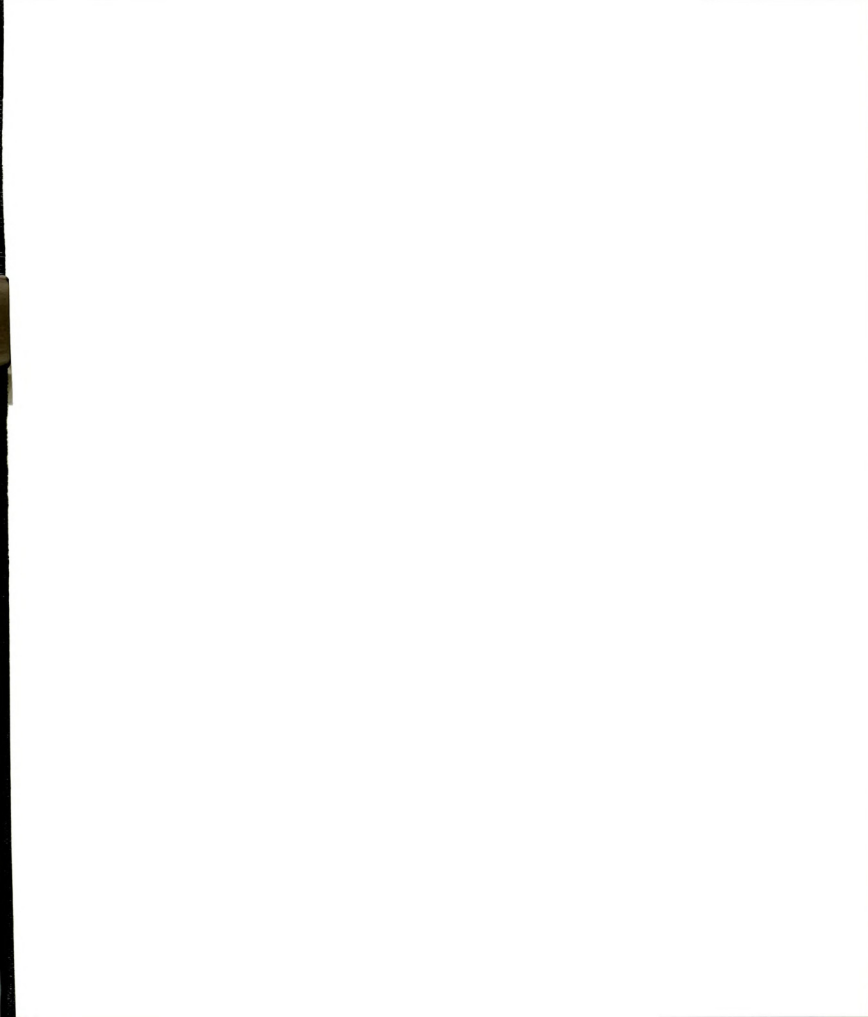
winter camps hosted by the Anti-Communist National Salvation Corps. The Corps, which was founded by the KMT in 1952, provided students with extra-curricular programs, ranging from military training camps to Chinese classes, dancing parties, and climbing clubs. In all of these programs, students were required to study the speeches of Chiang Ching-kuo and Chiang Kai-shek. Another function of the corps was to identify and recruit talented young people to the KMT.

The most popular song at that time was “The Descendants of the Dragon,” which stressed blood ties with China. Singing this song, students celebrated their connection to the motherland, China:

In the far off east there is a river, its name is the Yangtze River.  
In the far off east there is a river, its name is the Yellow River.  
Although I have never seen the beauty of the Yangtze River, I often journey on its waters in my dreams.  
Although I have never heard the strength of the Yellow River, it surges in my dreams.  
In the ancient east there is a dragon, its name is China.  
In the ancient east there is a people, they are the descendants of the dragon.  
I grew up under the feet of the great dragon; I am a descendant of the dragon.  
Black eyes, black hair, yellow skin, forever descendants of the dragon (Gold, 1993, p. 191)

Traditionally, the KMT’s language policy promoted Chinese identity and strictly limited the opportunities to speak and learn Taiwanese, Hakka, and aboriginal tribal languages (Bosco, 1994; Cheng; 1994). Thus, Mandarin was considered “high culture” while Taiwanese and other native languages represented “low culture.” The younger generation generally adopted this concept of high and low culture, discriminating against people who spoke Taiwanese or Hakka. This attitude towards language was reflected in the lyrics of popular songs.

However, in the mid-1980s, a new generation of singers emerged and some of



them sang popular songs with Taiwanese lyrics. One young pop singer, Lin Chiarnng explained: “Using Mandarin to express Taiwanese people’s feelings is wrong . . . Singing in Taiwanese is the best way . . . It’s much more direct, and you can sing with a lot of force” (Gold, 1993, p. 188). In addition to these Taiwanese popular songs, there was also a rise in nostalgia for Taiwan’s past, which was reflected in singing old Taiwanese folk songs which were popular during Japanese colonial rule and the 1960s.

Speaking mother tongues. Another related cultural shift involved the rising popularity of speaking the Taiwanese language. Since the early 1980s, the broadcast of the presidential address on the eve of the lunar new year was translated from Mandarin into Taiwanese and then into Hakka. In the mid-1980s, some television commercials mixed Taiwanese phrases with Mandarin. Public announcements at train stations began to be broadcast in Mandarin, Taiwanese, and Hakka. Since the end of 1980s, while Mandarin remains the official language, politicians and campaign candidates started to speak in Taiwanese and Hakka to win the support of Taiwanese voters. For example, both Soong Chu-yu (the governor of Taiwan in 1994) and Ma Ying-jeou (the mayor of Taipei elected in 1998), who are native speakers of Mandarin, spoke in Taiwanese native languages in election campaigns as one way to win votes.

Scholarship on Taiwanese history. Another noticeable cultural change was the increasing interest in Taiwan’s history. Because Taiwan history had been mainly placed in the context of Chinese history and because the discussion of some issues (e.g., the 2/28 incident) had been taboo, researchers rarely gave Taiwanese history much attention. However, beginning in late 1970s, given the growing opposition, a new generation of historians (who grew up in the 1950s) adopted a Taiwanese-centered perspective for the





interpretation of Taiwanese history (Chang, 1997; Dai, 1993; Duh, 1997; Lee & Liu, 1996; Weng et al., 1992; Wu, 1994 b). At the same time, universities started to provide courses in Taiwanese history and more academic researchers opted to study it. Consequently, Taiwanese history was no longer seen as a local history within Chinese history, but a field onto itself, necessary for understanding Taiwan.

By the end of the 1980s -- particularly after the lifting of martial law -- the 2/28 incident (previously taboo) had become a heated issue for both historians and ordinary citizens. For instance, a group of intellectuals established the *erh-erh-ba her-pirng-ryh tsuh-jihn- hui* (Association of a Peaceful Day to Memorialize the 2/28 Incident) and provided funds to collect relevant archives and publish their findings. Inspired to better understand Taiwan's past, university students became especially interested in the causes of the incident, as well as its historical significance.

In the 1980s, Taiwan not only witnessed widespread political and cultural changes, but Taiwan's economic growth was also notable. By the end of the 1980s, Taiwan had experienced extremely rapid economic growth: Its per capita GNP rose from approximately US \$50 in 1952 to US \$8400 in 1990. In addition to a general affluence enjoyed by many people, there was also a rise in various social movements, which included farmers, workers, women, veterans, university students, and teachers (Hsiao, 1991). These groups, as they gained voice, demanded that the government be more responsive to their needs. They participated actively in politics, voting, and sometimes demonstrating in the streets. During the 1980s, there were at least 18 social movements that registered their protest with the government by taking to the streets and petitioning the government. In 1987 alone there were about 1,800 street demonstrations (Tien,



1992). Participants included laborers, human right activists, teachers, aboriginal human rights activists, and farmers.

It is believed that the rise of these social movements fundamentally changed the relationship between the state and society in Taiwan for the society was no longer passive and the government was forced into the development of more progressive policies (Hsiao, 1991). Together, these economic and social changes suggested a promising future as Taiwan turned itself into an increasingly pluralistic society.

### **Transformation into a Full-fledged Democracy and the Shaping of a Common Shared Destiny: the 1990s**

Lifting martial law started the process of democratization. In the 1990s, ongoing democratization was focused on constitutional reform. While the wave of democratization continues as Taiwan becomes a more democratic nation, conflicting views about national identity remain (Lin, 1996; Wachman, 1994). During the course of democratization, the issue of national identity has continued to play a key role in both policy-making and political power struggles, within one political party or among political parties. At the same time, the 1990s have witnessed a renewed threat on the part of the PRC's military to force Taiwan to accept its one China principle. However, this threat leads to a belief in the importance of making Taiwan a *sheng-mihng guhng-turng-ti* (a living community with a common shared destiny), even among the rival national identity camps.

Because the issue of national identity is at the core of Taiwan's domestic politics, the course of democratization and the conflicting views of national identity played out by political parties are interrelated. At the same time that Taiwan walks towards democracy, there is more room to allow for conflicting views to be played out than had been the case



in previous decades. In this section, I focus on two themes, one concerning the impact of conflicting views of national identity on the course of democratization and another concerning the evolution of conflicting views of national identity in rival camps.

### **Constitutional Reform**

Constitutional reform that is geared towards making Taiwan a full democracy and also a de facto sovereign state involve three revisions. Although martial law was abolished in 1987, the opposition has continued to criticize the structure of Taiwan's political system. It is especially critical of the fact that the senior representatives who were elected on the Chinese mainland in 1947 still controlled the National Assembly and the Legislative Yuan -- the two most important institutions of policy making -- and of the election of president and vice-president. In addition, the DPP has asserted that the nation needs to abolish the Temporary Provisions under which the ROC president was granted extraordinary power and that the president of Taiwan ought to be directly elected by the citizens of Taiwan instead of the representatives of the National Assembly.

At the same time, the Taiwanese president and the KMT chairman, Lee Teng-hui, have continued the last president's (Chiang Ching-kuo's) will of political reform. As the ruling party, the KMT has controlled political reform while, at the same time, it has had to listen to its people's voices and cooperate with the major opposition, the DPP. Because of their different views concerning national identity, however, the two camps held different views on constitutional reform.

For the KMT, the ROC Constitution written in China in 1947 is a symbol of *fa-tong* (legitimate succession). According to this Constitution, the KMT government

claims that the ROC on Taiwan is still the sole legitimate representative fo all of China.<sup>43</sup> In other words, the ROC Constitution, which was enacted in 1947 when the ROC government was still on the mainland, is the paramount symbol of the KMT's one-China principle. To make a new Constitution in Taiwan would undermine the one China principle and imply that Taiwan is independent. It is, therefore, no wonder that the KMT government still insists on very limited revisions of the existing Constitution. In contrast, the DPP aims to build a new Taiwan as a sovereign state and thus asserts that the contemporary Constitution ought to be replaced with an entirely new one that creates a new political system.

However, the public does not support the DPP's proposal to redraft the Constitution.<sup>44</sup> Partly because of the revisions that were conducted by the ruling party, the DPP's intention to rewrite a new Constitution could not be carried out. Nevertheless, the KMT has responded to the DPP and taken their ideal of constitutional reform into account.

The first issue faced by the KMT in the process of constitutional reform has involved persuading the elderly members of the parliament to resign. Ironically, according to the ROC Constitution, the representatives of the National Assembly controlled the power to amend the Constitution and the elections of president and vice-president. However, the elderly members, who have been described by the DPP as "old

---

<sup>43</sup> In the 1990s, the KMT government emphasized the fact that the ROC still existed as a sovereign state "on Taiwan." This expression of the ROC's status is different from that of previous decades in which the national name was simply represented as "the ROC" without any supplementary note.

<sup>44</sup> When the DPP announced a draft of a new Taiwanese Constitution, a Taipei-based newspaper conducted a poll finding that the majority of respondents did not approve of the DPP's idea of drafting a new Constitution.





thieves” and “the 10,000-year delegates,” have been the first ones targeted for replacement. As early as 1986, a reform committee created by Chiang Ching-kuo issued a proposal concerning the replacement of the senior representatives. Initially, in March 1989, the government sent retirement forms to all senior representatives. Some responded that they would retire while the majority rejected it, claiming that if they retired they would “not be fulfilling their duty” (Chao & Myers, 1998, p. 220). Some elderly members argued that unless the PRC took over Taiwan or the island became an independent republic, they would not retire (Chao & Myers, 1998).

In March 1990, the KMT Central Committee nominated Lee Teng-hui as its presidential candidate. However, Chiang Wei-kuo (Chiang Ching-kuo’s younger brother) and his running mate, a Taiwanese KMT elite, Lin Young-kang, competed with Lee and his running mate, Lien Chan. Senior representatives and some mainlander KMT elites preferred Chiang Wei-kuo for his strong commitment to unifying China under the 1947 Constitution. For the first time since 1949, the KMT divided into two camps, *zhu-liu pai* (the mainstream) led by Lee Teng-hui and other outstanding committee and Central Committee members and *fei-zhu-liu pai* (the non-mainstream). On March 9, 1990, Lee Teng-hui publicly stated that “it is rare in a democratic society to have two factions of a single party running for the presidency, but, as long as there is unity and peace, that contest cannot harm the country or the party” (Chao & Myers, 1998, p. 190). Through mediating efforts, finally, Chiang Wei-kuo and Lin Young-kang withdrew from the competition.

In response to the elderly members’ resistance to retirement and the power struggle within the KMT, on March 14 in 1990, thousands of university students



nationwide began to demonstrate in the streets and conducted hunger strikes, protesting the KMT's inefficiency of constitutional reform and the chaos in the National Assembly. Banners and posters appeared at the Chiang Kai-shek memorial hall in Taipei with such slogan as "Down with the Thieves." For the first time in 40 years, there was a large-scale student movement calling for political reform. Lee Teng-hui met with several students and promised to carry out constitutional reform as soon as possible. On March 21 in 1990, the National Assembly voted for a new president, Lee Teng-hui. The next day, the students left the Chiang Kai-shek Memorial Hall and the protest ended peacefully.

Supported by students and the general public's demand for a reelection of the representatives of Parliament, Lee Teng-hui began constitutional reform with the issue of the senior representatives' retirement. The KMT initiated legislation to pay the senior representatives if they retired. In addition, an effort was made to force the senior representatives to retire: According to the order of the Council of Grand Justices, the senior representatives were to terminate their posts by December of 1991 (Chao & Myers, 1994).

But the constitutional reform needed the senior representatives to approve the abolition of the Temporary Provisions and amend the Constitution so that the reelection of new representatives could be conducted. On March 29, 1991, 604 representatives registered for the last meeting of the First National Assembly. In this meeting, the KMT took full charge of amending the constitution. In the first day of the meeting, eight DPP representatives held up two banners reading, "Political Blackmail Is Not Allowed" and "The Old Representatives Have No Right to Revise the Constitution" (Chao & Myers, 1998, p. 222). The Assembly agreed to abolish the Temporary Provisions and terminate



the state of insurgency with the Communists, and approved new articles for the 1947 Constitution for electing a new National Assembly (Chao & Myers, 1998; Leng & Lin, 1993).

The abolition of the Temporary Provisions was a significant event in Taiwan's democratization. In 1947, the Temporary Provisions had suspended constitutional democracy. For example, there was no limit on the terms of the presidency. Under the Provisions, the president could continue his presidency without limits. Thus, Chiang Kai-shek's presidency lasted for 28 years (from 1947 to the time he died in 1975). Moreover, the president dominated any policy-making that concerned threats to national security, natural disasters, economic problems, as well as the abolition of the Temporary Provisions. In addition, the abolition of the Provisions recognized the end of the state of civil war, and was a public admission that the PRC is a state that represents China (Chao & Myers, 1994). Without the abolition of the Temporary Provisions, Taiwan could never become a democratic country with constitutional rule.

According to the additional articles of the Constitution, which were passed during this meeting, the National Assembly would be composed of members elected entirely in Taiwan. Nevertheless, in order to maintain the status that the ROC represents China, some members of the Parliament were to be elected from Chinese citizens living abroad (twenty members for the National Assembly, six members for the Legislative Yuan, and two members for the Control Yuan).

Constitutional reform involved another issue, the election of president and vice-president. There was wide disagreement over the formula for presidential elections. The critical issue was national identity. The DPP insisted on adopting direct popular



elections, arguing that this formula would allow the people of Taiwan to select their president and then make Taiwan a de facto sovereign state (Hughes, 1997; Leng & Lin, 1993).

Within the KMT, two factions debated presidential election. This dichotomy became manifest when the ruling party prepared to attend the National Assembly's spring 1992 convention. One faction, composed of mainlanders, insisted that adopting the method of popular election would be equivalent to an announcement of Taiwanese independence from China: The president would be elected only by the people of Taiwan, not all of China. One KMT legislator, a second-generation mainlander, explained that only if the ROC president was elected by the National Assembly, could the ROC maintain the impression that the ROC president was the president of all of China (Hughes, 1997). According to the 1947 ROC Constitution, some of the delegates of the National Assembly were to be appointed by the President from overseas Chinese communities. Traditionally, the Constitution mandated an indirect election of the president, empowering the Assembly to select the president. In this way, the president -- at least symbolically -- represented all of China.

Originally, President Lee supported the indirect election approach. However, after taking public opinion into consideration, he eventually took the position of approving the DPP's idea of direct election methods (Chao & Myers, 1998; Hughes, 1997; Leng & Lin, 1993).<sup>45</sup> Lee explained that when he met local leaders, he realized that there was no popular support for indirect elections. Various scholars and leading

---

<sup>45</sup> In March 1992, the presidential election was a particularly heated issue in Taiwan's newspapers. Public opinion polls suggested that the majority of respondents supported the formula of direct popular election (Leng & Lin, 1993, p. 813).





officials from Kaohsiung and Taipei also suggested that many KMT candidates running for the December 1992 Legislative Yuan elections might lose if the party did not endorse direct elections (Chao & Myers, 1998).

As Lee Teng-hui changed his attitude, the KMT Central Committee had a heated debate over the two approaches to elections. Again, national identity was at the core. During a meeting, committee members stated that: "When we talk about constitutional revision, we should also take into account the Chinese mainland, and, therefore, we should not radically alter the Constitution" (Chao & Myers, 1998, p. 246). Other members argued that the direct election of president and vice-president would abolish the National Assembly, which is the institution that elects the president and vice-president, and, thus, would lead to a chaotic structure of the political system mandated by the 1947 Constitution. A senior mainlander Committee member, Cheng Li-fu, implicitly criticized Lee Teng-hui, arguing that the political process so far had performed well but that "some individuals" were trying to change everything (Chao & Myers, 1998).

The 1992 debates within the KMT did not reach consensus. However, since the trend towards democratization and popular elections for the highest leadership was supported by the mainstream of the KMT, the DPP, and the people of Taiwan, eventually, the Legislative branch approved the Presidential and Vice presidential Election and Recall Law in July of 1995, which established ground rules for the popular election of Taiwan's President and Vice-President.

Thus, at least, on the surface, the KMT conducted constitutional reform by the abolition of the Temporary Provisions, the reelection of representatives of Parliament, and the popular election of president and vice-president. Most significantly, the changes

in the law that empower Taiwan's citizens to vote for president, vice-president, and Parliament members means that the sovereignty of Taiwan is vested in Taiwan's population. Consequently, politicians need to take the will of the people seriously into account in their policy-making.

During the process of democratization, political parties and their agents have held conflicting views concerning national identity. Taiwan is a unique case that a successful process of democratization took place in the absence of a clear national identity (Wachman, 1994). To a certain degree, the result of democratization has provided a stage for political parties to articulate their views of national identity and to invite Taiwan's citizens to vote on these issues. Most importantly, democratization provides room for compromise across the existing gap of conflicting views of national identity among political parties, particularly in the face of the threat of the PRC, which continues to claim that Taiwan is its renegade province. In what follows, we will see how each political party defines its own view of the meaning of nationhood.

### **Tuung (Unification) versus Dur (Independence)**

The *tuung-dur wenh-tir* (problem of reunification versus independence) can be seen in the power struggles that occur within and across political parties in Taiwan. Currently, four parties -- the ruling KMT, the New Party, the DPP, and the Taiwanese Independence Party -- all coexist.

In 1993, after the debate over the issue of presidential elections, some non-mainstream KMT members left the party and established the China New Party. Others stayed in the KMT and still tried to promote the KMT's policy of Chinese unification. Most of the China New Party members are second-generation mainlanders. They

complained that Lee Teng-hui was inclined towards Taiwanese independence. The China New Party members uphold a strong Chinese identity and appear friendly towards the PRC. They claim that the New Party upholds the moral spirit of the two Chiang presidents' desire to recover the mainland.

In contrast, the Taiwanese Independence Party holds a strong Taiwanese identity. Originally, the founders of the party were the KMT members who were dissatisfied with a “softening” of the DPP’s original position to promote Taiwanese independence. For example, in the March 1996 presidential election, DPP officials announced that “even if the DPP becomes the ruling party in Taiwan, it would not immediately announce an independent Taiwan since Taiwan has been a de facto independent sovereign state” (China Times, July, 5, 1998). As a response to this statement, the Taiwanese Independence Party was established in August of the same year; its party platform -- building a Taiwanese Republic -- maintains that an education that cultivates a Taiwanese identity is a necessary and basic foundation for nation-building.

In the following explanation concerning the conflicting views of national identity, I mainly focus on the KMT and the principal opposition, the DPP, because their views of national identity generally reflect the public’s opinion on this issue. In addition, since the two parties play a significant role in Taiwan’s politics both domestically and internationally, their views of national identity have the greatest impact on policy-making. I begin with the KMT’s one China policy and the evolution of Taiwanese identity within the DPP.

The Guidelines for National Unification. Despite their persistent claim of recovering the mainland, under the rule of both President Chiang, the KMT never

proposed any concrete procedures to carry out this mission. In contrast, in March 1991, the National Unification Council, which the President chaired, produced the Guidelines for National Unification. By making the Guidelines, President Lee intended to appeal to KMT elder statesmen and conservatives to support his domestic political reform. He also *invited* a DPP member, Kang Ning-hsiang, to join the team proposing the Guidelines in *hopes* of persuading the DPP to support the Guidelines (Chao & Myers, 1998).

The Guidelines are a framework for the unification of China. Three main ideas **are** articulated. First, this framework stresses that a unified China must have the **following** characteristics: political democratization, economic liberalization, social **pluralization**, and a Chinese cultural renaissance. Second, the Guidelines argue that both **Taiwan** and the Chinese mainland are constituent parts of a single China and that the two **areas** are respectively governed by different political entities, with neither side having **effective** jurisdiction over the other. Third, the Guidelines assert that China's unification **should** only be achieved through peaceful means. The procedure towards unification can **be divided** into three developmental phases and there is no specific timetable for each **phase**. In the first phase, both sides should recognize the other's existence as a political **entity** and expand people-to-people exchanges. During the second phase, mutual trust **and** cooperation would be promoted through direct postal, transport, and commercial **activities**. The third phase would involve consulting and cooperating to create a political **framework** for unification which could reflect the will of the people in Taiwan and the PRC (Chao & Myers, 1998; Government Information Office, 1995). The Guidelines **redefine** the KMT's one China policy, moving away from "one China" to "one China, two **political** entities."

Two points suggested by the Guidelines are critical to understanding Lee's "one China policy." First, the meaning of "one China" is redefined in a more flexible way, in terms of history, culture, and lineage but not necessarily related to the concept of sovereignty (Hughes, 1997). The Guidelines assert that currently both Taiwan and mainland China are constituent parts of a single China. But within *the* one China, there **are** two political entities: the PRC's jurisdiction covers the Chinese mainland and the **ROC's** jurisdiction covers Taiwan and its offshore islands (the ROC Government Information Office, 1995). It becomes clear that under the Guidelines, Taiwan is not part **of the** PRC but part of "*the* China."

Second, the KMT's "one China policy" confirms that Taiwan definitely will be **unified** with China someday, but not now. Although the Guidelines provide an approach **through** three developmental phases to reach unification, it lacks a specific timetable. **Obviously**, the KMT government currently wishes to maintain the status quo in Taiwan, **advocating** neither immediate unification nor independence. The Guidelines have served **as the** KMT's official expression of its "one China" policy, over and against the DPP's **advocacy** of Taiwanese independence and the PRC's one China policy, where Taiwan is **seen as** a province of the PRC.

Lee Teng-hui's vision of *sheng-mihng guhng-turng ti* (living community).

Although the KMT set Guidelines for its one China policy, stressing Chinese unification **in the** future, Lee Teng-hui, the first Taiwanese president in Taiwan, also stresses the idea **of forming** a *sheng-mihng guhng-turng-ti* (living community) among people who have **different** provincial origins. Since 1992, Lee Teng-hui has persistently emphasized this idea **in** his speeches. For instance, at the end of 1992, when he visited southern Taiwan,

he gave a speech to local leaders in which he noted that to dissolve the tension between mainlanders and Taiwanese, Taiwan needed to form a sense of living community which is composed of people who possessed various provincial origins. Lee emphasized this idea in his speech at the 14<sup>th</sup> KMT National Congress in 1993. Further explained in his 1994 speech to a group of university professors, Lee Teng-hui interpreted living community as “a community with a civic concept” (Shing, 1998). Hughes (1997) indicated that Lee’s idea of *sheng-mihng guhng-turng-ti* (living community) and Peng Ming-min’s *ming-yun guhng-turng-ti* (community of shared destiny) have much in common. There is no doubt that Chinese nationalists within the KMT rejected the idea of *sheng-mihng guhng-turng-ti* because this idea seemed to be related to Peng’s notion of Taiwanese identity, that a political community is built by the subjective identification of individuals rather than the objective factors of ethnicity (Hughes, 1997).

However, Lee Teng-hui has continued to emphasize the idea of *sheng-mihng guhng-turng-ti*. At the same time, he also emphasizes Chinese cultural identity. When he addressed the Second National Assembly members on January 4 in 1993, he said:

We hope the joint efforts of the government and the people will not only enhance the substance of Chinese culture, but that such efforts will also help enhance the quality of life, on the basis of the fine artistic and literary accomplishment of Chinese culture, re-establish the social order within Chinese culture, re-unify the nation by relying on the nationalism contained in Chinese culture . . . and make Chinese culture the genuine magnet for attracting the hearts and souls of all Chinese people. (Lee, 1996, p. 134)

A slogan offered by Lee Teng-hui in 1995 also emphasized the concept of Chinese cultural identity. Noting that this time, Chinese culture is located on Taiwan’s soil, Lee Teng-hui asked the people of Taiwan to *jing-ying da Taiwan, jian-li xin zhong-yuan*

(manage a great Taiwan and establish a new central plain)<sup>46</sup> (United Daily News, January 15, 1995). This slogan includes two aspects of his efforts: not only making Taiwan a strong state but also making Taiwan a place closely connected to Chinese culture and national community (Hughes, 1997). Although Lee Teng-hui often reminded people of *their* Chinese ethnicity in terms of Chinese culture, lineage, and the connections to *Chinese* community, he has also often expressed the idea that Taiwan is already a *sovereign* state and, thus, not a part of the PRC. For instance, in an interview conducted *with* a Japanese journalist, he indicated that the population of Taiwan is the master of *Taiwan*, and he insisted that the notion that Taiwan belongs to the PRC is “a strange *dream*” (Lee, 1994, p. 473).

What Lee Teng-hui referred to *sheng-mihng guhng-turng-ti* (living community) and the belief about the Taiwanese people’s popular sovereignty is a notion similar to the *DPP*’s idea of Taiwanese identity when *DPP* members are forced to consider Taiwanese *public* opinion on national identity, given the current situation faced by Taiwan in the *face* of the PRC’s treat, and the international community’s disagreement with “one *Taiwan*, one China.”

The evolution of Taiwanese independence concept within the DPP. The *DPP* does not agree with the KMT’s “one China” policy as proposed in the Guidelines. In the 1991 election campaign for the second National Assembly, countering the KMT’s Guidelines for National Unification, the *DPP* proposed a Constitution of the Taiwanese Republic, stressing the idea of Taiwanese independence more clearly than ever before.

---

<sup>46</sup> The central plains on the Chinese mainland refers to the areas around the Yellow River and Yangtze Rivers. It has been considered a place where the Han people and culture originated and it is symbolic of an orthodox strain of the Chinese nation in terms of

The draft of this Taiwanese Constitution was announced in the 1991 election campaign by the DPP candidates. This announcement violated Article 100,<sup>47</sup> a national code regarding sedition: “If any person behaves as if he or she intends to destroy the national polity, steal or take over national property, use illegal means to change the nation’s Constitution, or actually carries out these intentions, then that person has committed a crime of domestic criminal violence” (Chao & Myers, 1998, p. 224). **However**, the KMT government did not arrest the DPP candidates at that time.

During their campaigns, the DPP candidates loudly voiced the slogan “Taiwan, **you** are my mother!” (Hughes, 1997, p. 71). The voices advocating Taiwanese **independence** have increasingly grown stronger over the last decade:

In years gone by, you could only whisper about T’ai-tu (Taiwanese independence) . . . A year ago, if you talked about it, you could be arrested. Now they’ve got campaign trucks, with flags saying “Republic of Taiwan,” blaring independence. It’s amazing. (Wachman, 1994, p. 211)

Influenced by KMT propaganda, the majority of voters believed the formula: “**Taiwanese** independence = Chinese invasion = Disaster” (Lin, 1992, p. 8). Due to the **fear of** upsetting the PRC, the majority did not support the DPP’s idea of the creation of **the Republic** of Taiwan. Rather, they trusted the KMT’s ability to guard Taiwan from the PRC’s threat. Consequently, in the 1991 election campaign, the DPP gained merely 23.9 % of the votes (and 66 seats), 5.7 percent less than that of the 1989 election campaign (Hughes, 1997). In contrast, the KMT represents “reform, stability, and

---

culture and lineage.

<sup>47</sup> In 1992, Article 100 was revised so that the crime of “domestic upheaval” was redefined: “If there is no act of violence and no threatening behavior, there will be no punishment” (Chao & Myers, 1998, p. 226). Since 1992, under the authority of the new **Article 100**, the advocacy of Taiwanese independence has been regarded as a freedom of **speech**; no one has been imprisoned.



prosperity.” They captured 71.17 % of the popular vote and 254 seats (Leng & 1993).

Within the DPP, there has been a conflict between two factions, the *Formosa faction* versus the *New Tide faction*. The *Formosa faction* views political reform concerning democracy and public policy as a priority while the *New Tide faction* demands Taiwanese independence as its main goal. During the 1992 Legislative election, under the leadership of the *Formosa faction*, the DPP especially emphasized social issues and downplayed its idea of Taiwanese independence by modifying “self-determination” and “one China, one Taiwan” (Leng & Lin, 1993, p. 823). With a more moderate attitude, the DPP won 31.9 % of the votes and up to 51 seats -- of the seats in the Legislative Yuan -- effectively offset the majority of the KMT legislators in the Legislative Yuan. In contrast, the KMT won 60.5 % of the vote of 161 seats (Chao & Myers, 1994; Leng & Lin, 1993). Celebrating the result of the 1992 election, the DPP chairman, Hsu Hsing-liang, declared that Taiwan no longer had a “party-and-a-half” system, but more of an institutionalized two-party system (Lin, 1993, p. 824).

In the 1994 elections for the governor of Taiwan, the mayors of Taipei, Kaohsiung as well as provincial assemblies and city council members, *tuung-a* (unification versus independence) again became salient. In the 1994 election for governor, the DPP candidate focused on “Taiwanese voting for Taiwanese” and the KMT candidate, Soong Chu-yu, for his mainland origin. In contrast, the DPP candidate showed his interest in speaking in Taiwanese and Hakka and his identification with local Taiwanese culture. The New Party candidate attacked Lee Teng-hu

hidden pro-independence agenda. In the end, the KMT candidate was elected a popularly elected governor of Taiwan.

In the same elections, the Taipei mayoral candidate for the DPP, Chen Sheng-toned down the DPP's pro-independence platform and won 43.6 % of vote. Taipei, capital, has long been the largest city. Of its population, mainlanders represent %, the highest percentage of any city in Taiwan.

Since 1992, in order to gain votes from conservatives, the DPP has mod-voice concerning Taiwanese independence by advocating "self-determination" China, one Taiwan" during election campaigns. In an outline for the election of 1995 and 1996, the DPP clarified that its assertion of Taiwanese independence strengthen the sovereignty of Taiwan and to defend Taiwan from being swallowed by the PRC (DPP, 1995). The DPP also further clarified the idea of Taiwanese independence. First, the Taiwanese independence movement focuses on the establishment of Taiwan as a sovereign state within its national territory including only Taiwan and the other islands.<sup>48</sup> Second, Taiwanese independence aims for Taiwan to join the United Nations under the name of Taiwan (not under the name of the ROC). Third, the movement believes that the government should empower citizens of Taiwan to exercise the right to referendum to decide Taiwan's future (DPP, 1995).

In the 1996 presidential election, the DPP appeared more moderate than the KMT by announcing that even if the DPP became the ruling party, it would not immediately announce an independent Taiwan since Taiwan has been a de facto independent state.

---

<sup>48</sup> The KMT government merely insists that the ROC on Taiwan is a sovereign state. Chinese nationalists in Taiwan, the statement "Taiwan is a sovereign state" express support for Taiwanese independence.

(China Times, July, 5, 1998). Moreover, the DPP leadership recognized that since Taiwan is a democracy where people enjoy the right to popularly elect their President and members of Parliament, there is no need to overturn the ROC and create a new Taiwanese Republic immediately. The DPP asserted that the issue of independence is **an** immediate one that needs to be resolved in the near future unless it is approved in a **referendum** (The Economist, December 6<sup>th</sup>, 1997, p. 23).

Because the PRC still claims Taiwan as a renegade province, the issue of national **identity** in Taiwan involves more than political power struggles among political parties. **The** PRC, as well as the international community (particularly the United States), also **plays** a key role in the future of Taiwan. In July and August of 1995, the PRC fired **surface-to-surface** missiles into the East China Sea about 140 kilometers north of Taiwan **because** Lee Teng-hui visited Cornell University. Again, in March of 1996, during the **presidential** election campaign, the PRC test-fired surface-to-surface missiles in waters **close** to major ports in northeastern and southwestern Taiwan and conducted war games **in the** Taiwan Strait, attempting to lead voters to blame Lee Teng-hui for creating the **crisis** and to vote for the candidates who were regarded as acceptable by the PRC. **At** **that** **time**, the March crisis led the U. S. to send aircraft carriers near to the Taiwan Strait.

In response to the PRC's military threats, a survey conducted one day after the **March** crisis showed that 71 percent of respondents were not afraid of the show of force (**Tien**, 1996). Nevertheless, the media called for the peaceful cross-strait relations and **efforts** to avoid provoking the PRC's anger through Taiwan's pursuit of a diplomatic **agenda** such as entering the United Nations. In this atmosphere of growing tension, the **DPP** **has** had to modify its political stand on national identity.

In 1997, when Hong Kong reverted to the PRC's authority, the PRC called for political negotiations between Taiwan and the PRC to apply the Hong Kong formula to Taiwan. In a response to the PRC's suggestion, the KMT government and 77 percent of survey respondents rejected the Hong Kong model (China Times, July, 5, 1998). The KMT government argued that the ROC is a sovereign state and that it is not a colony. Therefore, Taiwan has no reason to be treated like Hong Kong (Chang, 1997). As a result of the KMT's continued assertion of a one China policy, surveys conducted in 1995 suggested that 16.8 % of 2093 respondents supported Taiwanese independence while 15.6 % supported Chinese unification. The majority, 47 percent supported the status quo (Lin, 1996, p. 29). In a response to the increasing popularity of maintaining the status quo, the New Party, which is suspected of having connections to the PRC, also clarified its position on reunification with mainland China and has begun to emphasize the priority of the defense of Taiwan against the threat of the PRC.

There seems to be no easy solution to the issue of unification versus independence. Internationally, the ROC government, in the 1990s, claimed that the ROC is a political entity representing China and resists unification with the PRC as its province. Domestically, the KMT government educates its people that Taiwan is part of China culturally and someday Taiwan will be unified with the Chinese mainland. However, because of the PRC's efforts to isolate Taiwan internationally, the reality is that the ROC finds itself in a situation where it is "a state and yet not a state" (Yu & Longenecker, 1994, p. 475). Hughes (1997) also described the national status of Taiwan as an "intermediate state," neither choosing to be unified with China nor to be independent (p. 127).

In conclusion, the story presented here is a story about how conflicting views of national identity have been part of Taiwan's past. The Taiwanese were never forced to become Japanese during Japanese colonial rule. When Taiwan was returned to China, the Taiwanese had high expectations for liberation from Japanese colonial rule. Their high hopes were quickly dashed, however, by the corruption of Chinese officials and the violence of KMT troops. What followed was authoritarian rule for four decades, until 1987. Throughout this period, the Taiwanese had been educated to be Chinese, vowing to "counterattack the mainland and save our siblings." The KMT made every effort to articulate a Chinese identity and to legitimate the state as the one representative of China, in domestic politics as well as diplomatic relations. In the 1970s, the ROC government refused to accept the idea of "two Chinas" and "withdrew" from the U. N. Domestically, under authoritarian rule, there was no room for people to legally articulate another perspective of national identity until 1991. A consensus on national identity has yet to be reached among people on Taiwan; a minority hold a clear view of themselves as either Taiwanese or Chinese while the majority possess multiple identities, referring to themselves as both Chinese and Taiwanese (Lin, 1996).

We citizens of Taiwan are familiar with the history of struggling to preserve an attachment to the Chinese motherland, while also struggling to pursue a Taiwanese motherland as well, living through decades of being repressed by foreign political regimes, including the Dutch and Japanese colonialism, and the KMT authoritarianism. In this study regarding the teaching of Taiwanese history in light of the formation of national identity, I cannot help but ask: What is the role of the state in the promotion of Chinese identity in the school system? How do social studies curricula serve as a vehicle

for the transmission of a Chinese identity to students? How is Taiwanese history presented in the textbooks? How is Chinese history presented in school textbooks? What is the impact of the emergence of the opposition for recent curriculum reform? What new social studies curricula are being used in the face of a lack of agreement on national identity? In order to answer these questions, we need to better understand Taiwan's educational system, its national curriculum in general, and social studies in particular. I describe them in the following chapter.

**CHAPTER THREE**  
**EXPLAINING CURRICULUM CHANGE:**  
**SOCIAL STUDIES IN TAIWAN**

This chapter aims to explore how decades of political change are reflected in schools. Given the fact that social studies curricula have traditionally been associated with the education of citizens, changes in Taiwan's social studies curricula is of particular interest to us in this study. Throughout my analysis, I pay attention to both the role played by the state in curriculum development and the posturing of conflicting political power structures that have had an impact on curriculum development and change.

Research on curriculum change suggests that there are macro-level factors (e. g., economic forces, social and cultural values, and general attitudes toward the school curricula) and micro-level factors (e. g., conflicts and struggles among influential groups and individuals) that explain curriculum change (Skilbeck, 1985). Morris and his colleagues (1997) suggest that explaining curriculum change requires the examination of the combination of factors that led to the change. Nevertheless, among both macro- and micro-level factors, political power structures often rank as the primary forces in the shaping of social studies curricula, especially in nations undergoing significant political power struggles like Hong Kong and several African nations (Merryfield & Tlou, 1995; Morris, Clelland, & Wang, 1997).

Taiwan is no exception, since it has long been caught up in a complicated and extremely tense political debate over its national identity and status. The KMT government, in particular, has sought to communicate its political ideology at the

elementary school level through social studies curricula.

This chapter has two purposes: First, I explore social studies curricula as a vehicle for transmitting a Chinese identity to students. Second, I explain reformed curricula in light of recent political changes. I begin with a brief overview of the educational system and the national curriculum in Taiwan since the curricular story I will tell unfolds with a particular educational system. Next, I present specific social studies curricula. Finally, I describe recent curriculum reforms in Taiwan, highlighting the debate over textbook content that concerns Taiwan history. As will become clear, Taiwan history as a school subject has become a battleground for opposing camps in competition for control over official policy development concerning national identity.

## **The Educational System**

### **The Aims of Education and the School System**

The specific aims that the ROC on Taiwan now has for its educational system are found in Section 5, Chapter 13 of the ROC Constitution, which was established in 1947 when the KMT government ruled the Chinese mainland. Based on the Three Principles of the People, the aims of education include:

The purposes of Chinese education is to improve national living, to achieve mutual assistance among citizens, to develop national economic life and to prolong the life of the nation, so that we can attain, by all means, independence of the nation, democracy, and higher standard of living, and in the end, advance to an ideal world where harmony and equality prevail. (Smith, D. C., 1991, p. 6)

Since 1945, the Three Principles of the People have guided the development of education in Taiwan, covering ethics, Chinese nationalism, and democracy. (Ministry of Education, 1976)

In order to carry out the aims of education, the government designed a school



system which is comprised of three levels: elementary, secondary, and higher education. Since 1968, due to economic developments, compulsory education was extended through junior high school. All Taiwan citizens between the ages of 6 and 15 are required to attend school, first a six-year elementary school, then a three-year junior high school. After compulsory education, graduates who want to continue are required to take an entrance examination conducted by the Bureau of Education in each city<sup>1</sup> for either academic or vocational high school. Similarly, in order to study at state- or privately-run universities and colleges, high school graduates must take an entrance examination. Traditionally, the examination system has been used as the gatekeeper, selecting graduates who are capable of climbing the educational ladder to higher education. In the eyes of parents, teachers, and students, the primary purpose for teaching and learning in schools is to enable students to pass these examinations.

Taiwan's educational system is marked by rigid centralization and control by the Ministry of Education, which is part of the Executive Yuan.<sup>2</sup> The state uses the Ministry of Education to carry out the government's explicit educational purposes, including promoting economic growth, maintaining political stability, and enhancing Chinese cultural identity (Young, 1995). The Ministry of Education controls decision-making on all educational policies, ranging from curriculum and class size to the entrance

---

<sup>1</sup> The entrance examination at this level will be canceled in the near future; nevertheless, even under the new policy, students' academic performance will still be used as one of the factors influencing placement in high school.

<sup>2</sup> The Executive Yuan (Premier and Cabinet) runs the government. The Executive Yuan has a president (usually referred to as premier), a vice-premier, a number of ministers and chairmen of commissions, and several ministers of state. The premier is nominated by the president of the ROC. The vice premier, ministers, and chairmen are appointed by the ROC's president on the premier's recommendation.

examination for college, as well as the curriculum of teacher education programs.<sup>3</sup>

Perhaps the most influential duty under the Ministry's control is the development of the national curriculum.

### **The National Curriculum**

The national curriculum is composed of *keh-cherng biau-juun* (a close, but not completely satisfying, translation would be curriculum standards) textbooks, all of which are prescribed by the Ministry of Education. The Ministry of Education uses the *keh-cherng biau-juun* as an official expression of the government's prescribed educational goals for every grade level, every subject matter. Moreover, textbook editors and authors are required to follow the prescriptions of the *keh-cherng biau-juun* in the development of all national curricular materials. Through the design of *keh-cherng biau-juun* and textbook development, the national curriculum -- both in the past and currently -- functions as a powerful tool for transmitting the ruling party's ideology.

### **The Keh-cherng Biau-juun**

According to the Ministry of Education, the *keh-cherng biau-juun* consists of the regulations for curriculum making, for educational goals for each level of schooling, and curriculum development for each subject (Ministry of Education, 1993, p. 337). Curriculum standards for elementary schools include general educational goals for elementary education and specific educational goals for different grades and subjects. The time devoted to teach each subject is regulated in a unified school schedule (for instance, fourth graders have social studies for two 40-minute periods a week of social

---

<sup>3</sup> Both the subjects tested and the weight given to each subject in the joint examinations for universities and colleges are decided by the Ministry of Education.

studies instruction). A detailed outline containing topics of each unit and each section in each subject is also provided (Ministry of Education, 1993).

The first formal elementary curriculum standards were issued in 1932, identifying three goals of elementary education:

Elementary education is based on the Three Principles of the People and follows the ROC educational aims to build children's sound minds and bodies, to cultivate moral character, and to impart knowledge and skills for daily life. The purpose of education is to cultivate nationals who are patriotic and who are also able to carry out the virtues of righteousness and courtesy. (Ministry of Education, 1993, p. 338)

Based on these educational goals, it is clear that the ROC has promoted a focus on citizenship in elementary school, particularly patriotic education. With the 1932 standards, civic education came to be included as a subject taught in elementary schools. In addition, the subject matters of Chinese language, social studies, and the natural sciences have been used to promote the ideology of the Three Principles of the People.

Three revisions of curriculum standards were done in 1932, 1936, and 1948. These revisions mainly focused on changes in the allocation of instructional time and curricular changes, such as combining social studies, natural science, and hygiene under a single subject named "common sense." The educational goal of cultivating patriotic nationals remained especially prominent.

When the KMT government retreated to Taiwan in 1949, Chiang Kai-shek claimed that the defeat of the KMT by the CCP was, in part, a result of the failure of *ming-tzu jing-sheng jiao-yuu* (national spirit education). In order to safeguard ROC survival on Taiwan (and further establish Taiwan as a base from which to recover the mainland), Chiang Kai-shek emphasized national spirit education as the very heart of

schooling (Tsai, 1997). He concluded that, in order to save the country and eventually recover the mainland, school curricula, subject matters, and students' extra-curricular activities should focus on *ming-tzu jing-sheng chiao-yuu*. Educational policy makers of both central and local levels closely followed Chiang Kai-shek's orders and strove to carry out "national spirit education" (Ou, 1990).

National spirit education has been interpreted broadly, simultaneously emphasizing anti-Communism, reclaiming the Chinese mainland, and the Three Principles of the People. It has meant not only the development of a sense of patriotism to recover China in the face of the threat of the PRC, but also an emphasis on an attachment to Chinese culture and moral virtues (e.g., loyalty, filial piety, mercifulness, love, faithfulness, righteousness, harmony, and peacefulness). In short, education in national spirit has emphasized a Chinese identity and the mission of saving China from the subjugation of the Chinese communists.

In 1950, the Ministry of Education (following Chiang Kai-shek's orders) issued the Outline for the Implementation of Patriotism Education During the Communist Rebellion, which emphasized the teaching of the Three Principles of the People as a foundation for each subject. During the two years immediately following the retreat of the KMT government to Taiwan in 1949, Taiwan's school curriculum still followed the 1948 curriculum standards developed on the mainland. To reflect the national policy of anti-Communism, however, curriculum standards were published in 1950 and again in 1952.

According to the 1952 curriculum standards, the goals for elementary education remain within the scope of citizenship education, particularly stressing "patriotism" and

“moral education” (Ministry of Education, 1953, p. 3). In addition, the 1952 revision focused exclusively on social studies and Chinese language. The curriculum standards stressed that the selection of content for these two school subjects had to stimulate students’ patriotism and promote their belief in the Three Principles of the People (Ministry of Education, 1993; Young, 1994).

Textbooks were written to reflect these educational goals. For instance, in a 1958 lesson in a first grade Chinese language class, textbook authors encouraged children to do military exercises intensively so that when they grew up, they would defeat the Chinese Communists and recovered the mainland (NICT, 1958, Chinese language text, Volume 1, lesson 18). Second graders read a story where children discussed how to spend their lunar new-year gift of money given from their parents. The textbook authors concluded:

We ought to donate our new-year gift of money to our government so that our government can buy battleships and fighter planes to protect our country from enemy attacking enemies. (NICT, 1958, Chinese language text, Volume 3, lesson 28)

Textbook authors not only encouraged children to donate money to the government; they but also encouraged children to sacrifice their lives to guard the country. For instance, fifth graders read a lesson in Chinese language class about a great mother who wrote a letter to her son who was at the battlefield:

I love you with my life and I do not want to lose you. However, in order to guard our country, I want you to fight the enemy. Do not return home from the battlefield until you eliminate all of the enemy. If you unfortunately sacrifice your life in the war, I will encourage your young brother to be a brave soldier like you. (NICT, 1960, Chinese language text, Volume 9, lesson 14)

In 1959, the Office of the President demanded the revision of curriculum standards, arguing that it was necessary to meet the changing needs of the society.

Following the President's order, the Ministry of Education issued the 1962 curriculum standards.

There were several important features of the 1962 curriculum standards. For instance, emphasis was placed on the implementation of moral education, and courses in civic training were redirected to emphasize civics and morality. In addition, in order to improve students' ability to speak Mandarin, elementary students were required to start learning the phonic symbols of Mandarin in the first ten weeks of the first grade. With these new standards, national spirit education was repeatedly stressed (Ministry of Education, 1993). In the 1962 curriculum standards, the teaching goals of Chinese language not only included relevant skills and knowledge of reading and writing, but was also geared toward molding a sense of morality, cultivating a "democratic" and scientific spirit, and inspiring patriotism and an appreciation for Chinese culture (Young, 1994).

Textbooks were created to carry out the new educational priorities, stressing anti-Communism and the theme of the return of the ROC national army to the Chinese mainland. Wilson (1970) found that most Taiwanese children in the 1960s perceived the Communists as hostile. For instance, a third grade lesson from the Chinese language class portrayed Communists as inhuman and aggressively evil. Textbook authors ended the story proclaiming the hope for the return of the ROC army to China:

A man drowned himself because a (grain) tax placed on his family was too high. The Communists, however, fished his body from the water, weighed it, and subtracted his weight from the amount of (grain) tax due. The wife of the drowned man angrily shouts: "Despicable Communist bandits! When the ROC national army comes that will be the time of your death." (NICT, 1964, Chinese language text, Vol. 5, lesson 9; cited in Wilson, 1970, p. 115).

When fourth-graders read a poem about flying in Chinese language class, they were,

again, exposed to the dogma. The poem in question described how flying, like a floating cloud or a flying bird, was enjoyable from east to west, toward the sun. However, the poem ended by emphasizing on the KMT's return to China:

We will sit astride the narrow seas and see our blood-besmirched old homeland.  
We will break down the iron curtain, and bring the message of our counter-attack.  
(NICT, 1964, Chinese language text, Vol. 5, lesson 9; cited in Wilson, 1970, p. 116).

Beside the theme of the return of the ROC government to China, textbook authors stressed other themes. The importance of Taiwan as "the base for attacking the Communists and resisting the Russians" (NICT, 1964, geography text, Vol. 9, lesson 1; cited in Wilson, 1970, p. 115) is one example. Morality is another. Among the variety of virtues, the virtue of loyalty to the state (as exemplified by the KMT), Chiang Kai-shek, and Sun Yat-sen, was trumpeted as the highest virtue. Chiang and Sun were exalted as especially prominent models of national loyalty. For instance, third graders read a story about Sun Yat-sen. Textbook authors lauded Sun's loyalty:

He went through many dangers, yet he was not disappointed but finally overthrew the Ching government and established the ROC. (NICT, 1964, Chinese language text, Vol. 5, lesson 27; cited in Wilson, 1970, p. 90).

Due to the implementation of the 9-year compulsory education program, the curriculum standards were again revised and distributed in 1968. Chinese language and social studies again were considered essential for developing national spirit (Ministry of Education, 1993). The educational goals set by the new standards were based on the instruction of President Chiang Kai-shek, who emphasized the purposes of compulsory education: to develop the minds and bodies of young people, to mold a sense of civic morality, to spread the national culture, cultivate the scientific spirit, implement

vocational skills, and to improve the basic skills needed for living in the contemporary world. These goals were intended “to lay a foundation for students to be sound citizens who are patriotic, loyal, and courageous” (Smith, D. C. 1991, p. 71).

Anti-Communism remained a significant theme stressed by textbook authors in 1968. Three lessons in a sixth-grade Chinese Language class described how:

For people who live on Taiwan, it is like living in heaven, enjoying a prosperous life. For people on the mainland it is like living in hell, suffering from oppression, backwardness, and poverty. (NICT, 1972, Chinese language text, Vol. 11, lessons 4-6)

When Taiwan became an industrialized society in the 1970s, the Ministry of Education proposed new 1975 curriculum standards. The new standards still emphasized national spirit education, life education, and science education. Five instructional areas were identified: moral, intellectual, physical, social, and aesthetic development. Curriculum development was based on the Three Principles of the People, focusing on moral education, democracy, and science (Ministry of Education, 1993). The cultivation of decent and ethncal conduct among students, the appreciation of national culture, and patriotism and anti-Communism were highlighted (Young, 1994).

Reflecting these priorities, the teaching of morality focused on group (particularly the state and the KMT government) -- rather than individual -- development. Even virtue, which was seen by many as a place for the cultivation of the individual, was connected to loyalty to the state and Chinese unification. For instance, textbook authors of life and ethics described the importance of the virtue of neighborliness in the pursuit of the mission of Chinese unification (NICT, 1991, life and ethics text, Vol. 6, lesson 4). Patriotism was also emphasized; the principle role models were people who sacrificed



themselves in the Anti-Japanese War (Young, 1994)..

The 1975 curriculum standards shaped elementary school curricula for nearly 18 years. Despite steady revisions, curriculum standards in Taiwan traditionally had four principle features: (1) they were heavily influenced by political forces, particularly President Chiang Kai-shek; (2) national spirit education was at the heart of the standards, emphasizing patriotism, anti-communism, and commitment to the Three Principles of the People; (3) moral virtues pertaining to group life such as loyalty, obedience, courage, cooperation, and service to others were stressed and schooling ignored individual differences among students; and (4) educational development did not reflect society's changes for nearly 40 years (Young, 1994).

When martial law was abolished in 1987, textbooks drew considerable criticism from some teacher educators and researchers for the emphasis on Chinese consciousness (Dai, 1993; Lin, 1987; Ou, 1990; Shyr, 1993). Critics claimed that textbooks stressed the Chinese mainland as the motherland for Taiwan's children while it portrayed Taiwan merely as a base to recover that "motherland." They argued, for instance, that the social studies curricula were never designed to teach students to have a Taiwanese identity (Dai, 1993; Lee, 1995; Lin, 1987).

Influenced by political trends toward democratization and Taiwanization, additional criticisms of educational policies have been voiced since 1987. Most of these criticisms surround the content of the school curriculum. For instance, in September of 1987, a demonstration by Taiwanese aborigines, university professors, and university students protested a lesson, *Wu-fehng*. The protestors argued that the lesson should be removed from textbooks because it was full of Chinese Han biases concerning aborigines.

The lesson *Wu-fehng* had been traditionally included in Chinese language textbooks to encourage the development of the virtues of bravery and righteousness. Wu-fehng, the primary character of the lesson, was a Han Chinese translator working among the aborigines. Han Chinese communities and aborigines saw him as a good and trusted friend. To eliminate the aboriginal custom of using cut-off human heads to worship their deities, Wu-fehng decided to teach the aborigines a lesson. In the story, he told the aborigines that the next day they would see a man in a red gown and red hat riding a white horse on the foothill. They should kill this man. The next day, as the story goes, the aborigines saw the man that Wu-fehng mentioned and killed him. However, when they uncovered the man's hat and gown, they found it was Wu-fehng. Ruining the act, the aborigines vowed that -- even if they encountered draught or famine -- they would never again kill people to worship gods for harvest.

Yet historical records suggest that, in reality, the aborigines hated Wu-fehng and intentionally killed him, because as a translator in Ching's government, he aggressively exploited aborigines' properties and lands (Chen, 1985). The myth of Wu-fehng was created by the Japanese to teach aborigines to be civilized during Japanese colonial rule and in the hands of the KMT government, Wu-fehng became a role model of bravery and righteousness. But the lesson portrayed aborigines as uncivilized people and in the demonstration in 1987, aborigines and students alike objected to this portrait.

Other critics raised additional questions concerning the absence of Taiwan studies in textbooks (Lin, 1987; Ou, 1989). Some parents noted that the school curriculum had long remained unchanged, dominated by a Chinese-centered perspective:

My daughter is now in a high school. She has to memorize all the cities, all the

agriculture products, industrial products of every province [of China], the weather, the rivers, and the natural resources. Everything. We had to memorize all of this before, thirty years ago. I forgot everything. Now, my daughter has to memorize what I memorized and we know so little about Taiwan. We are forbidden to learn. We have no access, no resources. Some people get into trouble when they began to learn about Taiwan. When you begin to identify with Taiwan, people feel you are associated with the independence movement of the opposition. (Wachman, 1994, p. 40)

Similar concerns were raised by opposition legislators. At the end of the 1980s, for example, a DPP legislator on the Taipei Council questioned Taipei's Bureau of Education: "Why are our children, who live in Taipei, taught about China's Yellow River, which is far away from them while they are never taught about the Keelung River in their homeland?" (Bih, 1993).

These concerns lead to a 1990 grass-root movement support calling for curriculum reform for *ben-tuu-huah* (Taiwanization) (Huang, 1993). A popularly-elected county executive in I-lan and DPP member initiated a new subject, *shiang-tuu jiauh-shyuer* (the teaching of native soils in local studies), which aimed to create a curriculum relevant to Taiwanese culture and history. Taipei county, whose county executive was also a DPP member, also adopted I-lan's policy. For the first time in Taiwan, elementary students in the two counties received one hour per week of language instruction in Taiwanese, Hakka, or an aboriginal language. In addition, in *shiang-tuu jiauh-shyuer* (the teaching of native soils in local studies) class, children learned about Taiwanese folk theater, local history, and local cultures. Teachers were recruited to develop curricula and professional development workshops were provided

In 1993, the Ministry of Education drafted new curriculum standards, in response to changes in the political landscape, including the abolition of martial law, the

emergence of a pluralistic society, liberalization of the economic system, and Chinese culture presented as the mainstream culture (Ministry of Education, 1993). The 1993 curriculum standards mixed new ideas with old. In the list of educational goals, national spirit education (including the education of anti-Communism and the belief in the Three Principles of the People) are not mentioned. The education of patriotism, however, is still emphasized while the cultivation of a love to the homeland, Taiwan, is also emphasized. For instance, one of the goals of teaching music is to cultivate in students' a love for their home (Taiwan), their country (China), and the world (Ministry of Education, 1993). Chinese moral virtues such as obedience, patriotism, nationalism, and the love of Chinese culture are still the goals of elementary education under the new standards. In Chinese language classes, one teaching goal is to "inspire patriotism and the love for Chinese culture" (Ministry of Education, 1993, p. 53).

The most noticeable change found in the 1993 curriculum standards is the new subject, *shiang-tuu iiauh-shyuer* (the teaching of native soil or local studies), which was to be taught in one 40-minute period each week. This new subject, modeled on the I-lan project, then spreading to Taipei county, also led to the development of a new school subject in middle school, Knowing about Taiwan. The course concerned Taiwan history and geography and was to be taught two hours per week beginning in the 1997 school year.

These trends in curriculum reform are characterized by *been-tuu-huah* (Taiwanization or localization). Based on the 1993 curriculum standards, textbooks of Chinese language, music, and arts, include new content which focuses on Taiwan (Ministry of Education, 1993). For instance, students in music class now have

opportunities to appreciate folk songs from Hakka, Taiwanese, and Taiwanese aboriginal languages.

The Minister of Education claims that curriculum reform has nothing to do with power struggles among political parties. He explains that the teaching of native languages in schools is called for because of the need to “preserve ethnic cultures and to keep a variety of ethnic groups living in harmony with one another” (Central Daily News, April 3, 1993). Ministry of Education officials emphasized that these new curriculum standards were designed to cultivate student insights, as well as their abilities “to be citizens who stand in Taiwan with a love of this island,” but who also “cherish ambitious aspirations toward *da-lu* (the mainland)” (Ou, 1995, p. 46).

Lee Teng-hui (a native son of Taiwan), the KMT’s chairman and the ROC president -- who advocated a sense of common destiny shared by the entire population of Taiwan in 1993 -- praised the educational reform, criticizing the previous curricula:

The current curriculum reform brings a new subject, teaching local studies, into classrooms. Now, I assert that we need to teach children about Taiwan, including Taiwan’s history, geography, and their native roots. Over the past four decades, teachers did not teach children about Taiwan and exclusively taught them about mainland China. That kind of education is really ridiculous! (Lee, 1994, p. 476).

Lee went on to explain that when students learn more about Taiwan, they come to love the island more:

We ought to pay attention to Taiwanese local culture and teach our children to learn about their homeland so that the young are concerned with and love the land they live in and thus are willing to take responsibility for making Taiwan better. (Lin, 1994, p. 83)

Reflecting changes in public and the KMT’s political interests, the agenda contained in the new curriculum standards is different from that of previous ones in at

least two ways. Recovering the Chinese mainland is no longer the focus of school curricula. Moreover, the development and dissemination of curricular materials for Taiwan studies has increased. However, because the government still assumes Taiwan is part of China and that Taiwan will be unified with China in the future, an emphasis on Chinese culture, history, and geography remains.

The curriculum standards presented in this section are an essential part of the national curriculum. The role of the curriculum standards, even now that Taiwan has become more democratic, still represent mandatory instruction, dominating both textbook content and teaching.

### **Textbooks**

The national curriculum specifies that all schools are required to use uniform textbooks, published by the National Institute for Compilation and Translation (NICT), a government institute operating under the authority of the Ministry of Education.<sup>4</sup> When the KMT government moved to Taiwan in 1949, the NICT was moved from China to Taiwan for the purpose of “maintaining academic and cultural work, and to strengthen ideological education” (Tsai, 1997, p. 323). The NICT has maintained an ironclad policy of preservation and continuation of Chinese culture (Tsai, 1997). The directors of the NICT have all been mainlanders, as have most of the NICT-appointed members of the editorial team, and the reviewing committee. These two groups alone -- the members of

---

<sup>4</sup> The NICT has been the sole institute publishing textbooks. Recently, the Ministry of Education has allowed private publishers to publish elementary school textbooks and join the textbook market. Schools are now allowed to choose textbooks from either the NCIT or private publishers.

However, the NICT issues strict regulations and exercises the power of checking textbooks submitted by private publishers.

the editorial team and the reviewing committee -- have completely controlled social studies textbook content, which has, not surprisingly, tended to emphasize China over Taiwan (Tsai, 1997).

One of the important principles of curriculum design in Taiwan involves writing textbooks that are closely tied to *ker-cherng biau-juun* (curriculum standards). To attain this aim, an editorial team proposes outlines for each unit and submits them to the reviewing committee, which then checks and approves the editorial team's work. With the approved outlines, the editorial team then writes textbooks. After that, the editorial team and the reviewing committee meet to approve the content (Shyr, 1993; Tsai, 1997). During meetings, editors and reviewers consistently make sure that the textbooks faithfully adhere to curriculum standards (Lyu, 1994).

Textbook content is also carefully examined in light of earlier national laws and policies. Although martial law was abolished in 1987, editors and reviewers continue to avoid issues that were either taboo or controversial prior to 1987 (Lyu, 1994). For example, when the editing team and the review committee discussed how to describe the ROC territory, they wrestled with the problem of whether it was appropriate to realistically describe the territory of the ROC. A consensus was eventually reached: "We should not be involved in this controversial issue and just leave the textbook content regarding the territory of the ROC vague" (Lyu, 1994, p. 109).

Textbooks -- as regulated and monitored by the Ministry of Education -- can not violate national laws. For example, the KMT government promotes policies of Chinese reunification and Chinese identity, holding that China and Taiwan are inseparable. Therefore, Taiwan's textbooks describe the ROC as a nation with "35 provinces, one

special district, and two territories, Mongolia and Tibet” (Her, 1997, p. 36). After martial law was abolished, criticisms were aimed at the textbooks’ descriptions of the ROC’s territories. In response, the NICT director -- Ms. Chao -- explained that the NICT did not have the power to change textbook descriptions of the ROC’s territory (Her, 1997).

In sum, unlike the U. S. where teachers often design curricula or participate in textbook reviews and program adoption, teachers in Taiwan do not have such power. Instead, it is assumed that they will cover the national curriculum by transmitting textbook content to students. And there are some reasons to believe that teachers faithfully use the prescribed textbooks in their teaching. Educational inspectors from the Bureau of Education in each city regularly visits schools to see that appropriate materials are being used and that the teaching is being carried out according to the textbooks (Ministry of Education, 1993). In addition, within the schools, the administrators of teaching divisions, who are responsible for improving students’ learning and teachers’ teaching, often visit classrooms to supervise teaching and check progress of teaching schedules every week. Moreover, uniform periodical examinations conducted by the teaching division also require teachers to cover the scope of textbook content as scheduled. In addition to these administrative burdens, curriculum makers also encourage teachers to heavily rely on textbooks as their main teaching resource, providing them with teachers’ manuals. The manual includes detailed teaching materials and examples of teaching activities. A curriculum maker suggests that if teachers faithfully implement the teaching activities in the teachers’ manual, they “would not need to spend time on designing curriculum” and “would learn how to teach the new social studies curricula” (Chin, 1995, p. 169). Thus, teaching is conceived as merely covering the national



curriculum and transmitting textbook knowledge to students. Tsai (1997) claims:

Uniform textbooks, as a form of teacher-proof material, were a powerful device for obtaining a high degree of teacher fidelity to the national curriculum. (Tsai, 1997, p. 332)

Given this general overview of textbooks, I now move to a closer analysis of social studies curricula and related policy documents. Given the focus on national identity, I pay particular attention to curricular units that are relevant to Chinese identity and Taiwan history

### **The Social Studies Curricula**

The government prescribed and written curriculum materials for the elementary school social studies curriculum include 12 textbooks, 12 student workbooks, and 12 teacher's manuals. In this review, I focus on the teaching goals prescribed by the curriculum standards and textbook content

#### **Social Studies Curricula from the 1940s to the 1970s**

Social studies instruction in Taiwan was composed of three fields: history, geography, and civics. Geography has focused on the mountains, rivers, cities, transportation systems, and natural resources of China; history has been organized chronologically across Chinese dynasties. Civic education has been devoted to the development of students' morality and obedience to law. The teaching of all three subjects has been used to promote *ming-tzu jing-sheng* (Chinese nationalism) in students (NICT, 1978, Teaching guides of social studies).

Beginning in 1945 when the KMT government started to rule Taiwan, the government constructed a cultural policy aimed to "sinicization of Taiwan" (Chun, 1994; Chun, 1996; Yang, 1992). Especially critical to this effort was the use of social studies



curricula to educate Taiwanese children to become Chinese nationals. In September of 1945, in a meeting concerning the creation of a new education that would to eliminate and replace Japanese influence with an enhanced Chinese-centered perspective, the educational authority argued:

In order to make the masses of Taiwan feel proud to be Chinese and help them to produce love to their motherland, first of all, we need to educate Taiwan *turng-bau* to realize the greatness of their motherland and further inspire them to love their motherland. Therefore, history, geography, and Chinese language are important subjects to be taught in schools, telling students about the sages and men of virtue in Chinese history and the beauty of the motherland. (Huang, 1946, p. 393)

This perspective reappeared in a report submitted by Chen Yi soon after the 2/28 incident in 1947. He claimed that one cause of the uprising was the failure of the school system to shed a mentality created under Japanese occupation. He went on to suggest that schools needed to emphasize Chinese language, geography, and history to solidify Chinese nationalism among Taiwanese children (Wu, 1993).

Similarly, when the KMT government retreated from China to Taiwan in 1949, social studies again was considered the primary subject of carrying out national spirit education and of fostering students' love of their motherland and Chinese culture. According to the 1952 curriculum standards, one educational goal of social studies curriculum was to "inspire students' patriotism and develop *ming-tzu jing-sheng* (Chinese nationalism.)" (Ministry of Education, 1953, p. 123). According to this goal, topics in social studies textbooks were selected to "emphasize our country's culture, stimulate students' patriotism, and their determination to revive Chinese *ming-tzu* (Chinese ethnic

nationhood)" (Ministry of Education, 1953, p. 132).<sup>5</sup>

Social studies curricula and textbooks faithfully reflected Chiang Kai-shek's ideal of national spirit education. In 1953, he wrote Supplementary Statements on Education and Recreation in the Three Principles of the People. This document analyzed and defined the scope, contents, and goals of civic education. Since then, it has been regarded by the educational authority as the central guide for promoting civic education (Smith, D. C., 1991). Chiang Kai-shek argued that the promotion of civic education must pay special attention to the teaching of Chinese history and geography. He believed that through the teaching of these two subjects, students' patriotism and national pride could truly be aroused. According to Chiang, the subject matters of Chinese geography and history should be used to engage students in the realization of the fundamental significance of basic virtues (e.g., loyalty, filial piety, humanity, love, honesty, justice, peace and harmony). He hoped that the teaching of these two subjects would make all students citizens who loved their country more than their lives (Chiang, 1953).

Chiang's notion of civic education became the primary source for establishing the direction of social studies education. Teacher educators, policy makers (particularly Ministers of Education and directors of the NTIC), and curriculum makers, all followed Chiang's instructions. A teacher educator, who wrote a book about social studies teaching methods, clearly stated the educational goals:

To follow practical citizenship morals, loving and protecting the country and its people, bringing to light the inherent culture, creating and establishing the state, promoting common trust and confidence. (Wu, 1961, p. 16)

---

<sup>5</sup> For Chinese nationalists, the concept of *ming-tzu* (nation as ethnic group) and the concept of country are interchangeable.

Despite two revisions of curriculum standards in 1962 and 1968, policy makers literally re-stated the importance of teaching goals that had been identified in the 1953 social studies curriculum standards. For instance, in the revised 1968 social studies curriculum standards, the primary educational goal was stated as follows:

The teaching goal of social studies is to guide children to understand Chinese culture and its significance to our life in the modern age and to foster students' love for and protection of our country, as well as striving for the development of our country. (Ministry of Education, 1968, p. 161)

Chinese geography, history, and culture were all seen as important topics to be used for fostering a Chinese identity. Textbooks were written in adherence to this goal. Consider, for example, a lesson entitled “Lovely *Jung-huah*( China)”,<sup>6</sup> a third grade social studies lesson. This lesson is accompanied by a map of the mainland, described as “our country”:

We are all *jung-guor rern* (the citizens of the Chinese nation-state). The size of our national territory is bigger than that of the United States. The shape of our national territory is like a begonia leaf. Our country is a great country: its territory is huge and its climate is gentle. We love our country because the land of our country is majestic, rich in natural resources, and has a huge population. (NICT, 1968, social studies text, Vol. 1, pp. 1-2).

A poem is also included:

*Jung-huar! Jung-huar!*  
I love *jung-huar!*  
Your history is long enduring, your territory is majestic, and your productions are plentiful.  
You have a big population and your people are siblings sharing the same parents, loving each other dearly. (NICT, 1968, social studies text, Volume 1, p. 2)

---

<sup>6</sup> Stressing blood tie and Chinese culture as a foundation of making a Chinese nation-state, the KMT government has interchangeably used the two terms *jung huar ming-tzu* (Chinese ethnic nation) and *jung-guor* (Chinese nation-state). The former refers to Chinese ethnic identity and culture identity while the latter is related to national identity to a political community named China. Because the KMT promotes the ethnic concept of national identity, the KMT does not intend to make clear these two concepts.

History was another subject that was used to promote Chinese nationalism. To strengthen students' love for China, fifth grade history texts used in the 1960s were full of ethnocentrism:

The Republic of China has also the world's most exceptional race. The facts of the following historical examples can prove this. . . . Three thousands years ago, while other races of the world were still leading a primitive life, our country had already developed a writing system and simple writing implements. (NICT, 1964, history text, Vol. 2, lesson 11; cited in Wilson, 1970, p. 46)

Besides textbooks, extracurricular activities used to foster Chinese nationalism were also included in school programs. For example, anti-Communism oratory contests were held regularly in all schools from the elementary school through high school. The winner in each school then competed in national contests. In addition, students were required to make posters to memorize national days such as the birthday of the ROC, the birthday of Sun Yat-sen, the birthday of Chiang Kai-shek, Taiwan's Restitution Day, and the Constitutional Day. All principals, from elementary to high school, delivered an instructive speech in morning meetings for all students and teachers. The ceremony of raising the national flag continues to be practiced everyday: Students sang the national anthem together and salute the flag.

To meet the needs of rapid social development in the 1970s, the Ministry of Education revised the 1968 curriculum standards and issued the 1975 curriculum standards (Ministry of Education, 1993). The 1970s witnessed a setback for the ROC in its diplomatic relationships with the international community and the emergence of opposition to the KMT. In response, the curriculum standards were revised and subsequent social studies texts produced. Reflecting changes in Taiwan's domestic and

international status, more emphasis was placed on fostering a Chinese identity through the learning of both Chinese history and Taiwan's history; the intent was to encourage students to fulfill their mission and recover the mainland. Further editions of social studies textbooks that were produced in response to the 1975 curriculum standards were used from 1977 to 1993.

### **Social Studies from 1977 to 1993: A Closer Examination**

The 12 social studies textbooks which consist of 12 volumes are used from first to sixth grade. The textbooks are covered with colorful photos, ranging from China's Great Wall to Sun Yat-sen's mausoleum in Nanking, from Chiang Kai-shek's grave at Taoyuan (Taiwan) to a dam in Taiwan. The textbooks follow the expanding environments model that researchers found ubiquitous in U. S. elementary schools (Crabtree, 1989; Ravitch, 1988). The 12 volumes are organized around 12 topics. First graders learn about family and school life. Second graders learn about resources for living such as clothes, transportation, and housing. Beginning in the first grade, the national flag, national days, and great men (Sun Yat-sen and Chiang Kai-shek) appeared frequently in all textbooks.

In the third grade, textbooks concentrated on a series of imaginary communities, which were invented by the textbook editors. Students learned about ideal communities, ranging from rural and urban areas to fishing and mountain villages where residents enjoyed their life with no pollution, traffic jams, or criminals. Fourth graders learned about Taiwan and China in ways that emphasized Taiwan's role as a base for the recovery of China and an anti-Chinese Communist ideology. In fifth and sixth grades, students

studied Chinese history, geography, culture, and the contributions of Chinese culture to the world.

### **Teaching goals in the 1975 Social Studies Curriculum Standards**

The goals of teaching Chinese history in 1975 remained largely the same as in the past. Chinese culture, nationhood, and the national pride of being a member of *jung-huar ming-tzu* (Chinese ethnic nation) have long been and still are emphasized. Two goals in the curriculum standards are focused on:

1. To guide students in understanding that our ancestors expanded national territories over thousands of years.
2. To guide students to understand the history of *jung-huar ming-tzu* (Chinese ethnic nation) as well as the process of amalgamation among different ethnic groups so that students develop self-respect and an attachment to *ming-tzu* (Chinese ethnic group) to which they belong. (Ministry of Education, 1976, p. 153)

Two goals for teaching Taiwan history also focus on fostering a Chinese identity:

1. To guide students to understand Taiwan's past and the contributions made by great men in the development of Taiwan.<sup>7</sup>
2. To guide students to realize that Taiwan is the military base from which to recover *da-lu* (the mainland).<sup>8</sup> (Ministry of Education, 1976, p. 155)

---

<sup>7</sup> According to textbook authors, "the great men" were Cheng Cheng-kung and Chiang Kai-shek.

<sup>8</sup> Since the KMT government retreated to Taiwan, the ROC government has referred to China -- the PRC's territory -- as *da-lu* (a "big land" or "mainland"). Media, government documents, and school textbooks have adopted this term. Originally, the term implied that the ROC government denied the existence of the PRC by referring to the territory with a generic geographic term, *da-lu*. Even though the ROC government abolished the Temporary Provisions in 1991 (which characterized the PRC as a "bandit rebellion"), the custom of referring to China (the PRC) as *da-lu* remains. Recently, some journalists who support the idea of Taiwanese independence have been using the term "China" instead of *da-lu*, calling Taiwan "Taiwan."

However, this linguistic development has been protested by legislators who are Chinese nationalists.



### **Textbook Content**

The textbooks used between 1977 and 1993, based on these teaching goals, contained more subject matter about Taiwan than previous editions. Two volumes used in fourth grade focused on Taiwan geography, history (beginning from Cheng's rule to the end of Japanese rule), and Taiwanese people's ancestral origins, as well as Taiwan as a military base to recover the mainland. In addition, four units focused on the development of Taiwan under KMT rule and the government's determination to recover the mainland. Textbook authors explained that the purpose of the two fourth grade textbooks was to "inspire students' patriotism and enhance their determination of *faan-guhng fuh-guor* (counterattacking the Communists and recovering our country) (NICT, 1991, social studies teachers' manual, Volume 7, p. 9).

In a close analysis of textbook content (in units on Taiwan's history and Chinese history), three central themes emerge: the emphasis on the ethnic concept of *jung-huar ming-tzu* (Chinese as an ethnic group), the assertion that Taiwan is part of China, and the emphasis on anti-Communism and the recovery of the mainland. Let us consider textbook examples of each theme.

The ethnic concept of *jung-huar ming-tzu* (Chinese as an ethnic group). The textbook begins with a unit focusing on the formation of *jung-huar ming-tzu*. A legend about the Chinese people's common ancestor, *Huang-dih* (Yellow Emperor) is presented. According to the authors, the entire population of China are descendants of *Huang-dih*:

We *jung-huar ming-tzu* share the common ancestor -- *Huang-dih*. Originally, four thousand years ago, he was the leader of a tribe in northern China. He was intelligent and brave so that all tribes in northern China supported him as their leader. After *Hunag-dih* unified northern China, *Chyy-your*, a leader of a tribe in southern China invaded the tribes in northern China. In order to maintain peace,



*Huang-dih* counterattacked *Chyy-your* and eventually, defeated him, unifying southern China as well. (NICT, 1991, social studies text, Vol. 9, p. 37)

In addition to sharing a common ancestor, the textbook authors explain how the entire population of China has evolved into one big family:

Over thousands of years, a variety of clans have peacefully lived in Chinese territory. The big population has been connected by two important human relationships as a whole, either having shared common ancestors with the same family names or having been connected by marriage over generations. Therefore, we see the entire population of China as members of one big family. (NICT, 1991, social studies text, Vol. 9, p. 34)

The textbook authors emphasize shared blood ties as essential elements in the formation of the *jung-huar ming-tzu*.

Historians (Dai, 1993; Wu, 1994 a) and scholars (Chun, 1996; Juang, 1996) argue that there never existed an ethnic group called *jung-huar ming-tzu*. From ancient times, Chinese Han people have considered themselves to be located at the center of the world (*jung-guor* means middle kingdom), surrounded by culturally inferior barbarians on the periphery. These barbarians included the Manchus, Mongolians, Hui, and Tibetans. Traditionally, they have been seen as non-Han people. With the establishment of the ROC, Chinese nationalists invented the term *jung-huar ming-tzu*, referring to a unified race that incorporates Han and those four non-Han peoples. Thus, the term was a political invention. Chinese nationalists in the early years of the ROC began to associate *jung-huar ming-tzu* (Chinese as an ethnic group) with *jung-guor rern* (citizens of China). This association emphasized the need to consolidate a variety of people within territorial China into a single nation-state. Through the Chinese nationalists' schooling and propaganda, the concept of *jung-guor rern* has been thought to be the same as the concept of *jung-huar ming-tzu*; that is, all people sharing the same Chinese lineage and culture

are citizens of the Chinese nation-state. This concept of *jung-huar ming-tzu* illustrates the vague and inclusive nature of the modern concept of Chinese national identity (Chun, 1996; Juang, 1996; Wu, 1994 a).

Taiwan as part of China. Another popular theme that emerges in an analysis of textbook content involves the idea that Taiwan is part of China. Textbook authors have stressed the geographical location of Taiwan and Taiwanese people's ancestral origins. Many of these assumptions are not logically necessary, however, for explaining how Taiwan has been a part of China. Nevertheless, in the eyes of Chinese nationalists, tracing back to the past is seen as the best way to provide evidence for their assertions.

In one lesson in which a father tells his son about the geographical location of Taiwan, the father explains that originally Taiwan was connected to the Chinese mainland geographically in the prehistory age, implying that it had been that way in ancient times and that Taiwan was part of China. The father goes on to explain that, even if today the Taiwan Strait separates Taiwan and the mainland, Chinese unification would bring Chinese on Taiwan and on the mainland back together again:

Taiwan originally was connected to the mainland geographically as part of the huge continent several ten thousand years ago.<sup>9</sup> Due to the change in the nature, Taiwan became an island separated by the Taiwan Strait from the mainland. We hope that when we recover the mainland, the Taiwan Strait will not divide our people into two groups living in two sides of the Taiwan Strait anymore. (NICT, 1991, social studies text, Vol. 7, p. 7)

There was another unit entitled "Seeking Our Roots," which emphasized the importance of the Taiwanese people's ancestral origins. In this unit, the textbook authors

---

<sup>9</sup> Not only Taiwan, but Korea and Japan were also part of Asian continent during the ice age (a period of 1,600,000-10,000 years ago). During the Pleistocene epoch, the Taiwan Strait sank and formed a rift valley that separated Taiwan from the continent and isolated

explain the ancestral origins of the population on Taiwan, including Taiwanese aboriginal tribes. The authors claimed that “the Taiwanese aborigines originated from southern China and they are related to Chinese minorities, the *pur* and *yueh* tribes (NICT, 1991, social studies text, Vol. 7, p. 45).<sup>10</sup>

In a lesson entitled “Drinking Water and Thinking of its Source,” a father tells his son about their Chen family history:

Our ancestors moved from Her-narn Province in central China one thousand years ago to Fukien Province and then moved to Taiwan three hundred years ago. (NICT, 1991, social studies, Vol. 7, p. 53).

The Chen family history is used as evidence of the blood connection between people on Taiwan and in China. Accompanying the lesson, maps illustrate the voyage of Chinese settlers three hundred years ago. The authors argue that Taiwan’s ancestral home was the Fukien and Kwangtung provinces and, thus, the Chinese mainland is the root from which Taiwan sprang:

All rivers have origins and all trees grow up with roots. History provides us with a record of our ancestral origins. By studying history, we are able to seek our roots and this is important to our life. We should keep in mind that our roots are in our motherland, the mainland. (NICT, 1991, social studies text, Vol. 7, p. 91)

The textbook authors go on to argue that Taiwan has historically been a part of China since the Three Kingdoms (220-265 AD). In the most recent four centuries, two great men -- Cheng Cheng-kung and Chiang Kai-shek -- recovered Taiwan from the hands of foreign

---

it as an island (Chou, 1998; Hsieh, 1964).

<sup>10</sup> Taiwanese aborigines culturally and linguistically belong to the immense Pacific family of Austronesian or Malayopolynesian language (aborigines who live in islands spreading between Indonesia Ocean and southern Pacific Ocean); rather than having a connection to China. Another theory is that the Yueh people of the China coast may have been Austronesian and that the Austronesian languages probably originally spread into the Pacific from mainland East Asia (Ferrell, 1969)

rulers, saving the island:

Taiwan was restored to China (the ROC at that time). For this, we (Taiwanese) are indebted to many people, including those soldiers who sacrificed themselves in the Anti-Japanese War on the mainland, our national founder, Sun Yat-sen, who conducted the national revolution, and the President, Chiang Kai-shek, who recovered this island and saved us from Japanese oppression. (NICT, 1991, social studies text, Vol. 7, p. 104)

Anti-Chinese Communist Party Ideology and the Recovery of China. This theme of Taiwan as part of China is closely tied to a third theme, the mission of Chinese reunification. The KMT government also promoted an anti-Communist ideology, as well as the claim of recovering China to legitimate itself both internally and externally.

When Chiang Ching-kuo succeeded his father as the president of the ROC (Chiang Kai-shek died in 1975), he vowed to carry out Chiang Kai-shek's last burning desire to "carry out the Three Principles of the People and recover the national territory lost to the CCP." (NICT, 1985, social studies, social studies teachers' manual, Vol. 7, p. 9). In pursuit of this goal, Chiang Ching-kuo directed the Ministry of Education to increase curricular emphasis on anti-CCP ideology and the goal of the *faan-guhng fuh-guor* (counterattacking the Communists and recovering our country).

The post-war Taiwan is portrayed in the textbooks as a "heaven" built by the KMT where the people of Taiwan led a happy life, enjoying democracy. The anti-CCP ideology in textbooks criticized the CCP as brutal and mainland life as backward. Thus, the people on the mainland were wretched and miserable. By contrast, the textbook glorifies Taiwan and its developments and the textbook authors created a vivid contrast between Taiwanese and mainland experiences as a "life of slavery on the mainland" and "a life enjoying democracy and prosperity in Taiwan" (NICT, 1991, social studies text,

Vol. 7, p. 92).

The textbook's anti-CCP sentiment provides a rationale for the KMT government to reclaim the mainland and encourages people on the island to save their mainland *turng-bau* (compatriots).<sup>11</sup> To fulfill this mission, the textbook authors describe Taiwan as "a lighthouse with a beam of freedom, illuminating the mainland" (NICT, 1991, social studies text, Vol. 7, p. 91). The textbook authors argue that Taiwan has much to offer the mainland as a lighthouse:

We should share our economic experiences and prosperity with our *turng-bau* (siblings) on the mainland. It is our responsibility to accomplish the mission of national reunification so that we can share the fruits of Taiwan's experiences with our *turng-bau* on the mainland and pass on methods for raising their living standards. (NICT, 1991, social studies text, Vol. 11, p. 129)

The textbook authors go on to offer other metaphorical arguments for Chinese unification:

After a separation of 40 years, the Chinese who live on the two sides of the Taiwan Strait have been allowed to visit each other. After all, blood is thicker than water. We (Chinese on both sides of the Taiwan Strait) are members of a family, sharing the same blood and growing up with the same roots. The future of Taiwan is linked to the mainland and the hope of the mainland is linked to Taiwan; that is, establishing a new China with freedom, democracy, and prosperity is the wish shared by all *jung-guor rern* (citizens of China- state). (NICT, 1991, social studies text, Vol. 8, p.140)

In the 1980s and 1990s, as political, social, and cultural discussions erupted concerning the dominant KMT ideology, social studies curricula received scathing

---

<sup>11</sup> The KMT government has used the term *da-lu turng-bau* to address Chinese on mainland China. The term *turng-bau* means "siblings," stressing that all Chinese share the same lineage. The term reflects the KMT's ethnic concept of national identity, even towards Taiwanese aborigines, who actually are not members of Chinese ethnic groups. The KMT government used to address Taiwanese aborigines as mountain *turng-bau* in an effort to incorporate them into the Chinese ethnic nation. It was not until the 1980s that there was an emergence of an aboriginal movement that demanded that the government and public should address aborigines as *yuarn-juh-ming* instead of mountain *turng-bau*.

criticisms from teacher educators, scholars, and the general public. For instance, a journalist reported that a photograph presented in social studies textbooks that was used to illustrate the repression of Chinese people on the mainland was a fraud. The journalist went on to say that the photograph in the textbook was taken during the Anti-Japanese War and the children who were the focus of the photograph were members of a girls' choir in Her-nam Province. The news reporter criticized the textbook authors for providing a false message to children (United Daily News, July, 7, 1985). In addition, teacher educators and scholars argued that social studies textbooks were full of the KMT's political ideology that stressed authoritarianism, nationalism, racism, great Chinese consciousness, and loyalty to the political figures (Lin, 1987; Ou, 1990; Shiau, 1988).

In June of 1988, the Ministry of Education discussed a complete revision of elementary social studies textbooks and decided to adopt a new set of textbooks to replace the old edition. During the 1989 school year, two years after the abolition of martial law, the 1977 edition of social studies textbooks were replaced with a new edition. First graders who enrolled in 1989 were the first students to use the new textbooks and within the next 5 years, all 12 volumes of the textbook were completely replaced. By 1994, the entire elementary school population had new textbooks.

This was an exception in the history of Taiwan's curricula. The Ministry of Education explained that it had been necessary to provide a new curricula that would be more effective in helping students learn better in social studies (Chin, 1991). The curriculum creator indicated that, due to many shortcomings in both subject matter and teaching methods in the old textbooks, the educational authority had rushed to change the



old textbooks (Chin, 1991). According to Chin (1991), there were at least three shortcomings in the 1977 edition of social studies curriculum. For one, the subject matter selected by previous textbook authors appeared too “politicized” so that it did not fit well into children’s cognitive development stages in their learning of social studies. In addition, the 1977 edition of social studies curricula did not include the full range of social science disciplines. Moreover, the curricula did not focus on the teaching methods that would cultivate students’ abilities to think critically and solve problem (Chin, 1991).

In the eyes of the curriculum makers, the new social studies curriculum was seen as an innovation that would compensate for these shortcomings, as well as meet the challenge of cultivating citizens in the modern age (Chin, 1989). The new curriculum was lauded for not only reflecting the most advanced ideas in social studies curricula (like those that had already been adopted by the advanced countries), but also because it was well suited to the needs of Taiwan’s children (Chin, 1995; Ke, 1995).

In the following section, I introduce the features of the new revised social studies curricula, focusing on *keh-cheng biao-juun* (curriculum standards), the teachers’ manual, and textbook contents.

### **The Current Social Studies Curricula**

The 1993 social studies curriculum standards were proposed in 1989 by the same curriculum makers who created the new textbook. Four primary teaching goals were enumerated: cultivating individual development (e.g., the sense of self-esteem), stressing citizenship education, cultivating a love of the homeland (Taiwan), and creating a global vision. In addition, another goal involved the cultivation of students’ abilities to think critically, make decisions, and solve problems. With these goals in mind, the new social

studies curriculum seeks to develop democratic citizens with strong moral and civic sensitivities and abilities (Ministry of Education, 1993).

The earlier 1975 curriculum standards included the teaching goals of teaching two volumes on Taiwan history and geography aimed to cultivate students' identification as Chinese. In contrast, in the current curriculum standards, the teaching of Taiwan history and geography is clearly geared towards a cultivation of students' love of Taiwan. The educational goals of studying Chinese history and geography in the fifth grade, however, are still designed to cultivate students' Chinese patriotism:

To understand our country's geographical environment (the mainland) and our country's cultural heritage (Chinese culture) so that students can develop their thoughts and feelings of love for the country (China). (Ministry of Education, 1993, p. 160)

It is also clear that the government continues to believe that any educational reform must be congruent with the KMT's "one China policy." While Taiwanese studies have been introduced as part of the curriculum, history and geography textbooks still treat Taiwan as a part of China. It may be seen as contradictory to some, therefore, that the current social studies curriculum stresses citizenship education and claims to have the goal of cultivating students' critical thinking, problem solving, and judgment-making abilities, which are seen as essential qualities of democratic citizens.

### **Teachers' Manual**

Curriculum makers claimed that one innovation of the new curriculum was to reform social studies pedagogy to more actively involve students through participation in discussions, raising issues, and asking questions. The new curriculum standards describe teachers as facilitators who link subject matter to students' lives, not only by lecturing but

also by asking questions and helping students to find answers on their own. Three approaches are suggested:

Teachers should encourage students to participate in classes. Three approaches are provided here: first, teachers praise children when they express their opinions verbally or non-verbally; second, teachers should create a climate where children feel comfortable to express their opinions (i.e., if the teacher does not agree with children's opinions, the teachers should not directly criticize their opinions as wrong. Instead, the teacher should say something like: "Why do you think so? "What would be the result if you did it in such way?"); third, teachers should frame questions so as to arouse children's thinking. Teachers do not necessarily always tell students correct answers; rather, teachers should ask questions to guide students to think and leave them alone to find the answers for themselves. (Ministry of Education, 1993, p. 177)

In order to fulfill these aims, teachers need to reevaluate their teaching methods (Chin, 1995). One curriculum maker claimed that the design of the teachers' manual represented an innovation over previous years because it was designed to help teachers reform their teaching methods (Chin, 1995).

Teachers' manuals are used as a reference for teachers, providing plans for every lesson in the national curriculum. The basic structure of each lesson plan includes a list of teaching objectives and a description of instructional procedures that are meant to fulfill the lesson's objectives. Most teaching objectives focus on the teaching of certain "facts." For example, in the lesson entitled "Our Ancestors Came From *da-lu* (mainland)," one of the teaching objectives is "to enable students to understand the fact that Taiwanese *turng-bau*, ancestors came from the mainland." Two questions are connected to this objective: (1) Which two provinces did most residents of Taiwan come from, and what languages did they speak? (2) Why did they come only from these two provinces? The answers are provided by the textbook. Some questions are leading questions, designed to invite students to recite the textbook information:

After victory in the Anti-Japanese War, Taiwan was restored. What do you think about Taiwanese *turng-bau*'s mood at that time?

The teacher's manual tells the teachers to direct students to find a desirable answer to this question by looking at the photographs presented on page 82 (NICT, 1993, social studies teachers' manual, Vol, 7, p. 170).<sup>12</sup>

To encourage students to participate in discussions, the authors of the teacher's manual designed questions that they assumed would engage students. For instance, in a lesson about Taiwanese aborigines, two questions are posed:

Currently, where do we visit to learn about Taiwanese aborigines' life styles?  
What attitudes should we hold towards the *turng-bau* (countrymen) who possess different cultures and lifestyles than ours?

Again, the teachers' manual provides answers. For the first question, the answer is "aboriginal cultural centers." (These centers are designed for tourism, far from the real world where aboriginal tribes live). For the second question, the authors suggest that, "we should respect and appreciate their culture and lifestyles" (NICT, 1993, social studies teachers' manual, p.154). It is hard to find a single question that would evoke students' abilities to think critically about or come up with creative. It is difficult to imagine how the questions that are used could foster discussions. Rather, they appear to invite the recitation of pre-determined answers.

It appears, then, that even though the authors of the teachers' manual have embraced the rhetoric of constructivism and teaching for the development of understanding, their sense of what resources teachers would need to enact this vision of

---

<sup>12</sup> These photographs show scenes of people gathered and marching through the streets celebrating Restitution Day. In one photograph students were marching in lines with national flags. They look like troops receiving military review.

teaching remain highly underdeveloped. And their use of constructivism appears to be applied as a thin veneer to traditional school knowledge and practice, rather than a fundamental reconceptualization of the curriculum. The textbook authors provide questions, but those questions reflect no underlying sense of what makes a question a good one for evoking critical discussion and debate. The questions that were selected, and liberally sprinkled throughout the teachers' manual, therefore, tilt towards traditional models of teaching.

### **The Revised Social Studies Textbooks**

The current social studies curricula still follows an expanding environmental structure. Lower elementary students learn about family and school life while upper elementary students learn about community, the island of Taiwan, China (which is taught to be their country), and the international community. The geographical location of Taiwan is still described as "located off our country's (China's) eastern coast" (NICT, 1993, socials studies text, Vol. 7, p. 6). In addition, upper elementary students still study passages about the formation of *jung-huar ming-tzu* (Chinese as an ethnic group) and the myth of the common ancestor, *Hunag-dih*.

The new textbooks clearly look different from their predecessors. Most obvious is the change in textbook covers. The new covers consist of a series of cartoons, representing the theme of each volume. For instance, the cover of the seventh volume is a cartoon depicting two Chinese settlers building railroads. In the background are a train, railroad tracks, and two sailing boats out at sea. This cartoon illustrates the major theme of the seventh volume, the development of Taiwan, stressing the role of Chinese settlers and the Ching officials' contribution to Taiwan's development.

In terms of content, some topics are treated in the same way that they always have been treated, while others have been replaced or are treated differently. The national flag, political figures, Sun yat-sen and Chiang Kai-shek, are no longer introduced as consistently from the first grade on. Rather, among the 12 volumes, only two lessons -- the restoration of Taiwan and the establishment of the ROC -- introduce these political symbols. Moreover, the themes of anti-communism and recovering China, which used to be the core of the national curriculum, have disappeared. The metaphor of Taiwan as a lighthouse illuminating the future of China is not included, nor are the backward aspects of the mainland experience and the oppression of Chinese on the mainland.

The seventh volume, which used to concentrate on the role of Taiwan as a military base for the recovery of China, now concentrates exclusively on three units about Taiwan's geography, environmental conservation, and history. These new themes co-exist with lessons about the traditional themes concerning the formation of the Chinese nation, culture, and ethnic concepts of national identity.

The unit on Taiwan history is the focal point of this study. Therefore, I describe the content of this unit as a backdrop for the fifth chapter in which I describe how three teachers taught the unit.

The unit on Taiwan's history is organized around a chronological presentation of political powers that have controlled Taiwan. The first section entitled "Our Ancestors Came From the Mainland," focuses on the ancestral homes of the Taiwanese. The map that was used to illustrate routes taken by Chinese settlers to Taiwan in previous editions remains. The second section, "The Early Age of Taiwan," concerns the life of Taiwanese aborigines. It is a new topic that had never been included in social studies textbooks

before. While there are photos of modern-day tribal ceremonies, the texts lack substantial descriptions of the tribes' ancestral origins and cultures.

The rule of the Dutch is described in one sentence: "The Dutch oppressed Taiwan *turng-bau*, and took away Taiwan's properties" (NICT, 1993, social studies text, Vol. 7, p. 56). The era of Japanese rule is reduced to two episodes, one concerning the Japanese oppression of Taiwan *turng-bau*, and another concerning the resistance of the Taiwanese people. A paragraph describes how the Japanese controlled the Taiwanese and tried to eliminate their sense of being Chinese:

The Japanese wanted Taiwanese *vern-ming* (people)<sup>13</sup> to speak Japanese and to have Japanese names, aiming to eliminate Taiwan's *vern-ming*'s Chinese national consciousness. Many agriculture products, such as tea, rice, sugar, and camphor, were mostly shipped to Japan. The Taiwan *vern-ming* could not enjoy their harvest. In addition, the Japanese controlled commercial activities. Taiwan *vern-ming* did not have the freedom of speech. Things were painful under Japanese rule. (NICT, 1993, social studies text, Vol. 7, p. 76)

On the other hand, the textbook authors pay much attention to administrations of Chinese rulers, consistently describing their rule in positive terms. For instance, the rule of the Cheng family is referred to as "one of the most significant stages of the development of Taiwan" (NICT, 1993, social studies, Volume 7, p. 63). The six-year administration of a Ching official, Liu Ming-churn, is described as making Taiwan "the most advanced province in China" (NICT, 1993, social studies text, Vol. 7, p. 70). This unit ends with the episode of the ROC takeover of Taiwan in 1945. The authors described this change in Taiwan's status as "the victory of the Anti-Japanese War on the

---

<sup>13</sup> Two terms, Taiwan *turng-bau* (siblings) and Taiwan *vern-ming* (people), are used in the textbook to refer to the Taiwanese. These two terms are often used by both the KMT government and PRC. The textbook authors never use Taiwan *vern* or Taiwanese, terms mostly used by advocates of Taiwanese independence.

mainland” (NICT, 1993, social studies text, Vol. 7, p. 81). The unit concludes with the sentence: “Taiwan *turng-bau* cheerfully welcomed the arrival of the Day of Restitution” (p. 81).

Despite the increased emphasis on Taiwan history, the textbook authors still present a Chinese-centered interpretation, with all of the predictable bias and selectivity (Wu, 1994 a). One historian criticized this portrait of Taiwan history as a “fully Chinese Han-centered perspective with strong Chinese nationalism” (Wu, 1994 a, p. 92). He also noted that the authors ignored the place of Taiwan’s aboriginal tribes and that many of the historical “facts” presented in the textbooks were distorted and biased. Consider the following short list of historical errors found in the textbook:

1. Taiwan’s aboriginal tribes did not originate in China.
2. There is no evidence to verify that the immigration routes illustrated by the map are credible.
3. Cheng Cheng-kung did expel the Dutch, but the claim that he “recovered” Taiwan is questionable. Taiwan did not belong to China prior to Dutch occupation.
4. Cheng Cheng-kung did not establish schools in Taiwan to promote education for ordinary people.
5. The texts vilify experiences under Japanese rule, such as the lack of freedom of speech. Textbook authors omit the fact that Taiwanese people were allowed to form a political party (the Popular Party) and issue newspapers under Japanese rule, something they were not allowed to do under recent martial law. By putting under emphasis on the armed resistance movements, the authors omit the most significant Taiwanese social and cultural movements of the 1920s. (Wu, 1994 a, pp. 116-120)

The textbook authors simplified Taiwan’s history into three major themes. First, all foreign rulers oppressed and exploited Taiwan and did nothing good for its development. Second, it was only under Chinese rulers that Taiwan developed into a



civilized society. Third, Taiwan's history is the history of the Chinese opening their frontier land (Wu, 1994 a, p. 119). In addition, Wu (1994 a) noted that, since the textbook focuses on historical "facts" (some true, some not), there is little attention paid to the cultivation of students' abilities to "do" history, develop their historically thinking, or to think critically.

### **Conclusion**

In Taiwan, the state apparatus has long dominated educational policy -- particularly curriculum development and implementation -- through a highly centralized educational system which dictated the design of a national curriculum. From the 1940s to the end of the 1980s, national spirit education (reflecting the KMT's policy), which focused on anti-communism and the ideology of recovering the mainland, was pervasive throughout the school curricula, particularly the social studies curricula. However, after the abolition of martial law, the political tides of democratization and Taiwanization brought curriculum reform into schools and the need to cultivate students' abilities to think critically (so as to become participatory democratic citizens) was acknowledged.

I leave readers with a final observation. In the summer of 1997, when the set of new textbook for teaching a new subject, Knowing about Taiwan, was still in the process of being printed, New Party members protested that the new textbooks tended to promote Taiwanese identity and they asked the Ministry of Education to rewrite it. Chinese nationalists claimed that adopting the new textbook would teach students to identify themselves as Taiwanese instead of Chinese and would sever the umbilical cord between Taiwan and the Chinese mainland, eventually leading to Taiwanese independence (Association of Taiwan history, 1997; Baum, 1997). Historians who hold a Chinese

identity have also argued that there were many biases in the new textbook: The details about industrial and agricultural developments in Taiwan during Japanese rule might promote a pro-Japanese perspective. Moreover, they protested that the textbook authors exaggerated the 2/28 incident and that this would create tension between Taiwanese and mainlanders. Their objections also focused on terminology. For instance, Chinese nationalists have contended that the new textbook adopted the term *Taiwan rern* (Taiwanese people) to address the population of Taiwan instead of the term *jung-guor rern* (Chinese). They feared that the terminology would persuade students to form a Taiwanese identity.

The debate over textbooks was the most heated issue in the media in the summer of 1997. The two primary opposing camps, Chinese nationalists versus Taiwanese nationalists, were invited to debate the issue on television. Historians who espouse a Taiwanese identity joined with Taiwanese nationalists in approving the new textbook. However, they were dissatisfied with the textbook because it did not represent a version of Taiwanese history that had a fully Taiwanese-centered perspective (China Evening Post, June 23, 1997).

As we reflect on how political tides have influenced educational policy in general and the social studies curricula in particular, a question emerges: Do these shifts in the political landscape and educational policy have an impact on classroom practice? Researchers have noted the teacher's role as a curricular-instructional gatekeeper (Thornton, 1991). As political forces continue to shift and new directions are taken in curriculum development -- especially the replacement of the previous emphasis on the recovery of the mainland to that of educating students to become citizens of a democratic



society in the new century -- one needs to ask if teachers are prepared to respond to the new curricular demands and what role they play in shaping students' national identities? This will be my focus for the next three chapters where I investigate three teachers' political orientations in general and national identities in particular, their understanding of Taiwan's history, and their teaching.



## **CHAPTER FOUR**

### **TEACHERS AND THEIR NATIONAL IDENTITIES**

This chapter tackles the critical question of what political and social reforms and efforts outside of schools have to do with what is happening inside of Taiwan's classrooms. In this and the following two chapters, I report on three case studies of elementary school teachers and their social studies instruction. I begin this chapter with a sketch of each informant's biography and school setting. Then I provide a brief review of the conceptual framework that I used to frame my inquiry. The purpose of this review is to make sense of how U. S. researchers conceptualize the way in which political orientation and subject matter knowledge shape teaching. Drawing on this research, I argue that two ideological characteristics play an especially important role in one's teaching. The review of each characteristic is followed by a detailed description of each participant's political orientation and subject matter knowledge. And while contextual factors in a school -- such as class size and school culture -- may have a profound impact on one's teaching, here, I am interested in the teacher as primary agent (Schwille, Porter, Belli, Floden, Freeman, Kappen, Kuhs, & Schmidt, 1983; Thornton, 1991). Therefore, I have concentrated on two teacher characteristics that previous scholarship nominates as critical.

#### **Three Teachers**

I met the three teachers -- Ms. Chen, Ms. Hu, and Mr. Lin -- when they were teaching fourth grade during the 1997-98 school year. When I went in search of informants, I tried to find teachers who differed in their political orientations and national

identities. Both Ms. Chen and Ms. Hu have Chinese identities while Mr. Lin is a Taiwanese nationalist, advocating an independent Taiwan. I interviewed and observed these teachers so as to learn about their characteristics and the ways that they actually taught Taiwan history as it relates to national identity formation.

All are experienced teachers. Ms. Chen is in her mid-50s with 36 years of teaching experience in elementary schools. Mr. Lin is in his mid-40s and has taught in elementary schools for 22 years. Ms. Hu, in her late 20s, has 9 years of teaching experience. As elementary school teachers, this group is representative in terms of gender distribution (in 1997, sixty five percent of 92,104 elementary school teacher in Taiwan were female while the other 35 % were male). These three teachers share an interest in and commitment to teaching. They enjoy teaching and regard it as their life long career.

I begin with the story of Ms. Chen.<sup>1</sup> In telling each informant's story, I focus on significant events or circumstances in his or her teaching life, ranging from decisions to become a teacher and to learning about Taiwan history in school to the school environment in which each works.

### **Ms. Chen**

As an experienced and versatile teacher, Ms. Chen's expertise ranges from Chinese language to natural science to social studies. Over the last 9 years, she has specialized in teaching social studies. She refers to herself and is recognized by her

---

<sup>1</sup> Pseudonyms are used for all informants. In Taiwan, teachers are addressed formally by "(family name) *laau-shyh* (it means teacher in English)." Throughout this dissertation, I refer to all of the informants as Ms. or Mr. in order to capture the flavor of the formality with which teachers are addressed in Taiwan.

colleagues as an exemplary social studies teacher.<sup>2</sup>

Ms. Chen decided to become a teacher when she was a student in an excellent girls' middle school. She set her sights on teaching for several reasons. Partly, it was because it was her father's wish. She was also inspired by a role model, a Chinese literature teacher who was devoted to teaching. In addition, teaching seemed a good profession for her given her own personality and her interest in and affection for children. In 1958, she graduated from the girls' middle school and passed the normal school entrance examination.

At the normal school, Ms. Chen majored in Chinese literature, her favorite subject. During the three years of normal school, Ms. Chen took courses such as Chinese geography, Chinese history, Chinese literature, and civic education, all of which were similar to courses provided by academic high schools where students were prepared to take the entrance examination for universities. Ms. Chen was also required to take a course in pedagogy. Of importance to this study, she never had a class in Taiwan history.

After graduation, with excellent academic grades, she was placed in one of the best elementary schools in her hometown.<sup>3</sup> As a beginning teacher, she did very well.

---

<sup>2</sup> During interviews, Ms. Chen appeared proud of the fact that she taught social studies. She volunteered that parents told her that their children thought that her social studies class was the best in the school. When I visited Ms. Chen's school in search of potential study participants, one of her colleagues declined my invitation when she found out that Ms. Chen would be a participant because she did not want to be compared with Ms. Chen. She explained: "Ms. Chen is an exemplary social studies teacher. When I taught social studies for the first time, Ms. Chen was my mentor, who guided me as to how to teach social studies."

<sup>3</sup> From 1945 to the mid-1990s, all teacher education institutions were state-supported and educated the K-12 teaching force. Tuition was free and all students received monthly allowances. Most lived in dormitories, supervised in ways similar to military schools. In exchange, graduates were obligated to teach for a period of time equal to the number of



The principal appreciated her teaching and recommended her to attend a one-day workshop where teachers were taught how to be mentors for the implementation of an experimental curriculum for Chinese language. Ms. Chen considered the workshop to be a “turning point” for her, providing her with a vision of a good teaching:

Teaching should be lively and interesting enough to engage students to learn. In the workshop, teacher educators modeled an advanced teaching style for us. They taught in alternative ways: asking students questions, conducting discussions in small groups, arranging activities of role-playing. They did something that is really different from traditional teaching. Generally speaking, with the traditional teaching style, teachers lecture all the time and students listen passively. (Chen, I # 1, 9/12/97)<sup>4</sup>

In 1976, Ms. Chen moved to Taipei; since then she has taught at Ai-guor (it means patriotism) Elementary School.<sup>5</sup> Ai-guor, serving approximately 1,500 students in 36 classes, is one of the best elementary schools in Taipei, and it is located in a district with universities, schools, a state-supported library, and a technology center. Parents are mainly from the middle and upper-middle classes and most are well educated with professors, doctors, teachers, high-ranking public servants, and managers among their ranks. Most parents are concerned with their children’s schooling and the content of instruction.<sup>6</sup>

---

years that they had enjoyed tuition-free education in teacher colleges and universities. All graduates listed their placement priorities. Final placements were determined by academic grades and conduct. Graduates with excellent records were placed where they wanted to teach. This practice has changed in recent years. Teacher education is no longer free and graduates have more freedom to choose where they teach. In addition, private universities and state-run academic universities are now allowed to offer teacher education programs.

<sup>4</sup> Throughout this study, interviews (I), observations (O), post observation interview (Post-I), and pre-observation interview (Pre-observation-I) are numbered and dated.

<sup>5</sup> Pseudonyms are used for all of the three elementary schools in this study.

<sup>6</sup> During my field work, I observed parents actively helping maintain traffic safety after school. In addition, this school organizes parent study groups and programs of one-day

As an elementary school affiliated with a state-supported teacher college in Taipei, Ai-guor teachers have had more opportunities than others to experiment with innovative curriculum. Student teachers regularly come to observe teaching and to student teach. Teacher educators often bring their students to the school and invite teachers to join their meetings. Ai-guor teachers, therefore, have had many opportunities to increase their knowledge and skills.

As part of a curriculum reform that was initiated with the 1993 curriculum standards, the government required elementary schools nationwide to teach students a new subject: local studies, including local culture, local history, Taiwanese language, Hakka, and aboriginal languages. Ai-guor developed a local studies program that included field trips to local communities and lessons that teach students Taiwanese children's folk songs. The principal told me that the purpose of teaching local studies was to cultivate students' love of their hometown, Taipei, and that the local studies program did not intend to transmit a sense of Taiwanese identity.

### **Ms. Hu**

Partly because of her mother's preference and partly because she wanted to work with children, Ms. Hu enrolled in a teachers college in Taipei in the fall of 1986. By doing so, she gave up the opportunity to enroll in an excellent girls' academic high school which would have prepared her to enter a university.

---

visitation for parents every semester. Ms. Chen told me that parents who did not like certain teachers who criticized certain political parties (either the New Party or DPP) had called the principal, protesting that the teachers were "polluting" the school. This suggests that at least some parents were listening carefully to children, and actively monitoring the school with respect to how teachers transmitted political ideology to children.

She majored in Chinese literature. Because Taiwan's elementary school teachers are generalists, Ms. Hu was required to take a social studies method class. However, she did not find the methods class helpful; what she found more relevant to her social studies teaching was a required course on Chinese history.

In recalling her studies at the teachers college, Ms. Hu concluded that she had not been well prepared with respect to either subject matter or pedagogical theory. She does not think that these insufficiencies influence her work as a teacher, however, since she finds it easy to follow the textbooks. In addition, she believes that getting along well with children and maintaining good relationships are more important than teaching itself.

After graduating with good grades in 1990, Ms. Hu was assigned to Hsin-yi (literally, it means honesty and righteousness) Elementary School, which enrolls approximately 2500 students in 65 classes. Hsin-yi shares two features in common with Ai-guor: both are affiliated with state-supported teacher colleges and both attract children of parents who do not live in the district. Hsin-yi is located in a district near central government agencies, such as the President's Office, the National Library, and the National Bank. Some parents are public servants and most parents, as is the case with Ai-guor, are from the middle and upper classes. Most pay close attention to their children's academic performance and are concerned with what students are taught.<sup>7</sup>

Hsin-yi Elementary School recently instituted an innovative academic evaluation system. Traditionally, Taiwan's elementary schools require students to have two or three

---

<sup>7</sup> The parents' association in Hsin-yi is very active. Parents and the school cooperatively issue a monthly newsletter to help the school communicate with parents. Ms. Hu told me that some parents had also made calls to the principal complaining that some teachers transmitted their political stances to children (Hu, I # 1, 9/6/97).

periodic examinations each semester, using textbooks as the main resources for the examinations. However, Hsin-yi requires students to take a final test only once each semester. The examination is conducted by the school teaching division; it takes the form of multiple choice and fill-in-the-answer questions that tests students' mastery of factual knowledge. Thirty to forty per cent of a student's overall grade comes from the examination and teachers control most of the process of grade assignment. With the goal of changing students and teachers' attitudes about learning, Hsin-yi's principal wants teachers to create new ways to evaluate student academic performance, such as doing book reports or presentations. However, some parents protested the new policy, asking teachers to conduct more traditional examinations. They argued that students needed to practice taking examinations. Parents noted that middle schools give intensive examinations to test students' mastery of factual knowledge prescribed by textbooks so that students are able to pass high school entrance examinations. The parents' opinions toward the evaluation system are very strong and some homeroom teachers take this very seriously.

As part of curriculum reform promoting local studies, Hsin-yi has also developed a series of local studies programs, including Taiwanese theater, *Gezaxi*.<sup>8</sup> Hsin-yi's leadership has a plan to develop another series of local studies that includes having

---

<sup>8</sup> *Gexaixi*, a Taiwanese folk theater created in the 1920s in Taiwan's I-Lan County, is performed in the Taiwanese language, the mother tongue of the majority of Taiwan's population. During the period of martial law in Taiwan (1949-1987), under a Chinese mainland-orientated cultural policy, the Taiwan government oppressed any form of expression of Taiwanese culture and *Gezaxi* was neither encouraged nor supported by the government.

Due to the recent trend of Taiwanization, *Gezaxi* has gained attention from both governmental cultural institutions and academic researchers (Chang, 1997).

students collect data on nearby historical buildings.

Ms. Hu has taught a variety of subjects, ranging from Chinese language to music. Three years ago, due to added responsibilities in the student counseling office, Ms. Hu began specializing in fourth grade social studies. Following the textbook, she found teaching social studies in general, and the unit on Taiwan history in particular, easy. As a student herself, Ms. Hu had no opportunities to learn about Taiwan history. She recalled:

There was no chapter in the textbooks teaching us specifically about Taiwan history. History classes mainly taught students Chinese history. Taiwan's history was only mentioned as a small part of the chapter on the Ming and Ching dynasties in Chinese history class. (Hu, I # 1, 9/6/97)

Although Ms. Hu was not a history major, she was interested in the study of history. This interest was inspired by her middle school history teacher. She recalled:

History is about historical events, historical figures, and dates. In history classes, we were expected to remember many facts in order to obtain high grades, which was essential to be able to enter high school. My history teacher was a good teacher, who devoted herself to helping us remember key information in textbooks. She was good at systematically organizing key information for us so that we were not confused by having so many things to memorize. (Hu, I # 1, 9/6/97)

When she started specializing in the teaching of social studies, Ms. Hu made a set of transparencies to present key factual information to her students. According to her, transparencies were effective in helping students organize critical information crucial to examinations from the textbooks.

### **Mr. Lin**

Becoming a teacher was one of Mr. Lin's childhood dreams. When he graduated from middle school, he had an excellent academic record and gained acceptance into three high schools. He made a decision to enroll in a teachers college in Taipei. His

decision to become a teacher was partly inspired by his elementary mathematics and history teacher. Mr. Lin uses that teacher as his role model for being a patient and caring lifelong teacher.

Mr. Lin's major was elementary education. In his opinion, the quality of both teacher education curriculum and teacher educators was not very good at that time. In the first three years at the teachers college, he took general courses similar to those provided by the academic high school. In the fourth and fifth years, students were required to take several courses in pedagogy and in specific subject matter. According to Mr. Lin, the academic standards set by the teachers of pedagogy and specific subject matter were loose; students did not need to study hard and yet they expected to get good grades. An avid reader, Mr. Lin recalls that by studying books about politics, the economy, Chinese literature, and Chinese history on his own, he learned more than he did from his classes.

After graduation, Mr. Lin taught in an elementary school in Taipei County. Due to his interest in social science, he underwent a joint examination at the university and received permission to enroll in night classes in the Department of Political Science at a university in Taipei. Throughout his studies, he continued to teach full time. In five years, he earned a bachelor's degree in political science.

In his 22 years of teaching, Mr. Lin has taught a variety of subjects, including mathematics, science, and social studies. While I was doing my research, Mr. Lin taught fourth grade social studies for the first time.

As a student, Mr. Lin had little opportunity to learn about Taiwan history:

We were not taught much Taiwan history in history class. Students learned only about several historical figures such as Cheng Cheng-kung and Liu Ming-chuan. That is all. My understanding of Taiwan was shallow. For example, because I

grew up in a farm village whose residents were all Taiwanese, I did not know of the existence of other ethnic groups in Taiwan. As a child, it was not until I studied in the teachers college and had classmates who were Hakka and from aboriginal tribes that I realized that Taiwan was a multicultural society with diverse ethnic groups. Living in the college's dormitory, I made friends with them and I came to appreciate the beauty of Hakka culture and aboriginal languages. (Lin, I # 1, 9/5/97)

Over the last 10 years -- as a result of the emergence of Taiwanization as a political movement -- studies of Taiwanese culture, aboriginal culture, and their histories are no longer taboo. In fact, they have become popular topics for researchers, historians, and publishers. In this new environment, Mr. Lin has had access to books written by a new generation of historians who hold a Taiwanese-centered perspective. In addition to his own readings, he has attended a study group sponsored by the Teachers League, an association advocating Taiwanese independence. Members read and discuss books that are relevant to Taiwan history, Taiwanese literature, and aboriginal cultures. Sometimes, the group invites authors and historians to share ideas.

Having taught in Jiang-guor (it means nation-building) Elementary School for 17 years, Mr. Lin gets along well with his colleagues, including the principal and administrators. As a result of recent educational reforms that calls for greater teacher autonomy, Mr. Lin was elected by his colleagues as a coordinator of the Teachers Association in Jiang-guor. The establishment of the Teachers Association on a nationwide basis is part of the educational reforms being spearheaded by teachers, which challenges the official view of reform. Teachers in this association actively demand that the government release teachers from the constraints of teaching the national curriculum and change the traditional role of teachers as public servants to form a teachers union. In a sense, Mr. Lin identifies himself as an educational reformer and a social activist.

Jiang-guor Elementary School is located in a community where the majority of residents are Taiwanese. It is a large school with approximately 4000 students and 109 classes; all students are local residents. Most parents are owners of neighborhood stores and blue-collar workers. Some are public servants, such as policeman and teachers. Generally, parents are cooperative and rarely criticize teachers.<sup>9</sup>

Since the 1980s, a majority of Taipei County citizens have voted for DPP candidates in all local elections. Under the DPP's administration, Taipei County has initiated a local studies program in elementary schools, requiring the teaching of local history, aboriginal languages and customs, and the Taiwanese language.<sup>10</sup> Most Jiang-guor students are Taiwanese. To meet the needs of students, the school's local studies program focuses on the teaching of the Taiwanese language and community folk festivals.<sup>11</sup>

In sum, the three teachers share some characteristics but also represent a great deal of variation. All are devoted teachers and, regardless of their differences in age, none of them studied history in general or Taiwan history in particular. However, there are

---

<sup>9</sup> During data collection, I interviewed an administrator and the principal. Both mentioned that parents were cooperative. They said that, to them, working in this school was delightful because teachers and parents got along so well.

<sup>10</sup> Under Taiwan's centralized educational system, the pioneering and innovative local studies program initiated by Taipei County's educational department represented a curriculum reform at the grass roots level. It was not until 1993 that the Ministry of Education initiated new national curriculum standards, calling for the teaching of local studies in elementary schools nationwide.

<sup>11</sup> With the language policy that exclusively promoted Mandarin as the official language over the past 50 years, most Taiwanese parents themselves do not generally speak Taiwanese and, consequently, they do not speak Taiwanese with their children, especially in northern Taiwan.

Most children with Taiwanese roots, Hakka roots, or from aboriginal tribes can not speak their native languages (Cheng, 1994).



important differences among them. They work in different schools and communities. As a study focusing on the teaching of Taiwan history with respect to national identity formation, it is necessary to look at the communities in which teachers work. As in the U. S., in Taiwan, parental intervention in schools is related to social class (Lareau, 1989). In Ms. Hu's and Ms. Chen's schools, parents take active roles in their children's education, while parents in Mr. Lin's school are unlikely to intervene. Moreover, parents' political orientations also differ by social class. Generally speaking, in Taiwan's political context, most KMT supporters come from the middle and upper classes -- public servants, teachers, professors, and managers of private and public sectors -- while most DPP supporters are blue-collar workers and farmers (Wu, 1992 a; Wu, 1992 b). Parents of children in both Ms. Chen's and Ms. Hu's schools are mainly KMT supporters while parents in Mr. Lin's school are mostly DPP supporters.

The purpose of this study is to carefully examine two potentially significant variables in teaching: teachers' political orientations in general and national identities in particular, as well as knowledge of subject matter. In the next section, I examine each informant through these two lenses.

### **Scholarship on Political Orientation and National Identity**

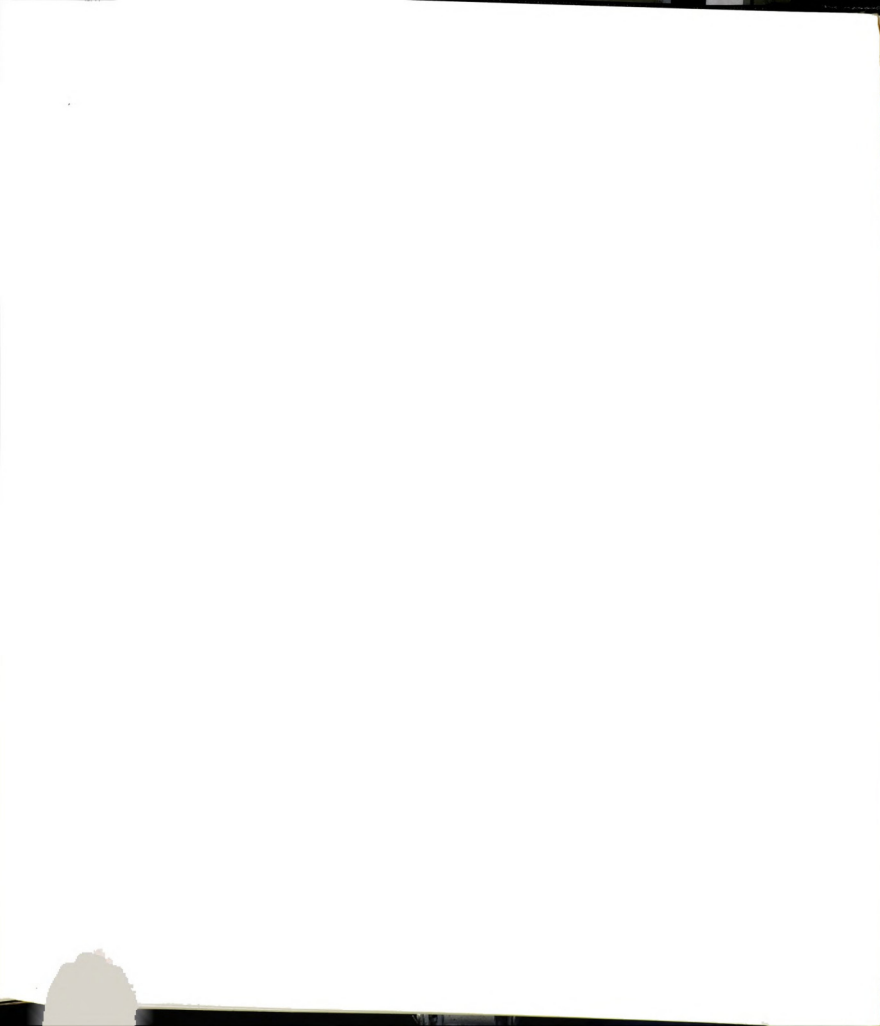
Before presenting the three teachers' political orientations, I provide an overview of the concept of political orientation and the relationship between social studies education and teacher's political orientation.

Some researchers consider teachers to be significant agents of political socialization (Dawson & Prewitt, 1969), particularly social studies teachers (Leming, 1991). Because social studies has been more devoted to citizenship education than other

school subjects (Barth & Shermis, 1970; Jenness, 1990; Longstreet, 1985), social studies teachers' politically-relevant characteristics may be revealed to students relatively often and may play an important role in citizenship education (Leming, 1991).

But what is a political orientation? A political orientation or political self-identity is a complex of orientations that make up one's political sentiments, including views toward his/her own political role (Dawson & Prewitt, 1969). An individual's political orientation includes these elements: feelings of nationalism, patriotism, political party affiliation; attitudes and evaluations of specific political issues and personalities; knowledge of political structures and procedures; and self-image concerning perceived responsibilities, rights, and one's role in the political world (Dawson & Prewitt, 1969).

Researchers have rarely examined teachers' political orientations and the role that their political orientations and national identities play in teaching. In one review of teacher's characteristics, Leming (1991) suggested that the teacher's political orientation had a potential value for understanding their teaching style. Leming (1991) indicated that, according to a survey of American teachers' political orientations, thirty percent of those polled were conservative and fifty six percent were moderate. Only 16 percent considered themselves liberal (Leming, 1991). This data suggest that a majority of American teachers hold somewhat conservative political attitudes. This tendency buttresses the observation that U.S. teachers, in general, convey a consensus view of societal values and avoid controversial issues (Dawson & Prewitt, 1969; Farnen, 1994; Leming, 1991; Wirt & Kirst, 1982). Since K-12 school teachers tend to have mainstream political orientations, it is no wonder that teachers emphasize community values and are unlikely to advocate cultural transformation in their roles as teachers of social studies



(Giroux, 1985). However, Leming did not conduct any empirical study to explicitly address the question of how an individual teacher's political orientation influences their teaching.

In another study, Anderson and his colleagues (1997) found that teachers' perspectives concerning citizenship education were related to their political party preferences. The researchers found that teachers who looked at citizenship education from the perspective of fostering critical thinking were much more likely to be Democrats and to self-identify as political liberals. On the other hand, teachers who emphasized an assimilationist perspective were much more likely to be Republicans and politically conservative. These researchers also found that teachers who emphasized the importance of critical thinking encouraged their students to question social and political norms, while assimilationists emphasized teaching the rights and responsibilities of citizenship.

Evans (1993) explored the link between a teacher's political orientation and what occurs in the classroom. He examined teachers' political ideologies and found that teachers' "approaches to the teaching of history are linked, implicitly, to competing ideological orientations" (p. 179). For instance, teachers who are identified as storytellers were likely to be conservative, focusing on passing on traditions and understanding the past. Another type of teacher -- oriented towards a scientific understanding of history -- was much more likely to be liberal and to advocate the liberation of students, encouraging them to ask questions. However, Evans admitted that this finding was based on teachers' self-reports. Data from classroom observations and student interviews suggested that, "what teachers say they are doing and what an observer or students may see are often quite different; a lack of consonance often exists" (Evans, 1993, p. 209). As Evans saw

it, one of the reasons for this lack of consonance was, “teachers have to cope with their reality by remembering the good parts” (Evans, 1993, p. 209).

The literature provides little empirical evidence as to how a teacher’s political orientations influence classroom practice. Nevertheless, the research does suggest that a teacher’s political orientation may play an essential role in what they emphasize and how they present subject matter to students. This research stimulated my interest in conducting an empirical study of the relationship between teachers’ political orientations and their teaching.

With respect to teachers’ political orientations, I need to clarify that, in the context of this study, I specifically focus on teachers’ sense of national identity. There are reasons why I concentrate on this aspect of political orientation. First, the identification of one’s nationality and feelings of loyalty toward one’s country are a basic foundation of one’s political orientation (Dawson & Prewitt, 1969; Verba, 1965). Moreover, unlike most other countries, Taiwan is a unique case that is regarded as an intermediate state (Hughes, 1997). Among people on Taiwan, there is little consensus yet concerning national identity (Copper, 1996; Hughes, 1997; Wachman, 1994). Taiwanese teachers’ orientations regarding their political world is quite different from that of U. S. teachers. In discussions of U. S. teachers’ political orientations, political orientation is generally conceptualized in a broad sense, such as political party preferences or general attitudes toward political issues. Since the U. S. is not a divided country, a sense of competing views of national identity is not included in discussions of teachers’ political orientations. However, in the political context of Taiwan, the issue of national identity is an integral issue, dominating internal and external political policies concerning national status, the

nation's boundaries, institutional designs, the presidency, competition among political parties, and the design of school subjects and textbook content. Therefore, for teachers on Taiwan, an integral part of political orientation is the sense of national identity and a teacher's sense of national identity might be closely related to their view of nationalism, their political party preferences, and their opinions and evaluations of political issues.

When I decided to focus on teachers' sense of national identity, I was forced to ask myself: How can I conceptualize a teacher's sense of national identity in order to examine the teachers' political orientation in general and national identity in particular? Before answering this question, we need to understand how researchers conceptualize national identity and the elements that comprise it.

First, it is necessary to address a conceptual confusion surrounding the term "nation." Because of the interchangeable usage of the terms "nation" and "state," it is difficult to understand with precision the object to which the sense of national identity is attached. "Nation" refers to "a self-conscious and self-differentiating community of people bound together by common history and solidarity" (Kim & Dittmer, 1993, p. 241). "State," on the other hand, is a legal concept, referring to "an internationally recognized political entity possessing tangible territorial, demographic, and governmental attributes" (Kim & Dittmer, 1993, p. 242). "Nation" and "state" overlap in some ways; a state may be composed of many nations while members of the same nation may belong to different states. With the emergence of the Western model of the nation-state in Europe in the nineteenth century, it was argued that a sense of national identity could not easily arise without the existence of a political community or state (Kim & Dittmer, 1993).

Sociologists conceptualize social identity as "shared beliefs and sentiments" and

“enacted social roles and statuses that maintain the social order” (Kim & Dittmer, 1993, p. 238). Verba (1965) defined the sense of national identity as “the extent to which individuals consider themselves members of their nation-state” (p. 529). The nation-state represents an essential object of one’s emotional attachment; moreover, individuals define themselves -- who they are and their location within the world -- as citizens of the given nation-state to which they belong. Political scientists have studied identity as a resource for state formation, modernization, nation building, and democratization (Pye, 1971; Rustow, 1967; Verba, 1965). Verba (1965) puts special emphasis on the significance of national identity with respect to both individuals and countries: “One searches for it, nations need it, people fear the loss of it” (p. 529).

There is no doubt about the significance of national identity. More than that, however, we need to know what constitutes a sense of national identity. Verba (1965) indicated that the formation of national identity did not simply refer to the identity that accompanies the physical location where one lives. Rather, the development of national identity involves a politically legitimate entity with clearly defined boundaries and membership. For him:

Unless those individuals who are physically and legally members of a political system (that is, who live within its boundaries and are subject to its laws) are also psychologically members of that system (that is, feel themselves to be members) orderly patterns of change are unlikely. (p. 529)

Rustow (1967) agrees with Verba with respect to the development of national identity. He emphasized three important factors in the formation of national identity: a clearly defined national territory, membership in the political community, and the recognized legitimacy of the nation-state. For him, to have a national identity,

individuals:

. . . must know what territory and what persons are included in their national community; they must be willing to accept a larger measure of authority for the performance of public services; and they must participate in their common affairs on a basis of approximate equality. (Rustow, 1967, p. 35)

Pye (1971) emphasized the significance of clear physical boundaries to the formation of a national identity: “As long as there are many fundamental doubts as to what land belongs to what governing community and what are the boundary limits of the collective territory of a community, then there is an identity crisis” (p. 114). Pye, Verba, and Rustow, thus, all point out that a clearly defined national territory is a fundamental condition for membership in a political community. Their conception of national identity refers to a civic concept of national identity. The notion of national identity, however, goes beyond this civic model of national identity. Smith, A. D. (1991) differentiated two models of national identity: the Western (or civic) model and non-Western (or ethnic) model. The elements of each model differ. Chinese nationalists have an ethnic concept of national identity while Taiwanese nationalists have a civic concept.

The concept of nation or nation-state in the civic model is predominantly a territorial conception, stressing that a nation must possess a well-defined territory on which the sovereignty of the state and citizens is based; statehood and nationhood in this model are synonymous. The state is legitimized as a political community in which citizens have rights and duties. Citizens of any given state share common historical memories, traditions, and myths. Mass or public education systems are used to educate people into a common culture, serving to bind people together who possess different ethnic backgrounds. The civic model of national identity emphasizes cultural and



political bonds, uniting in a single political community all members who share an historic culture and homeland (Smith, A. D., 1991).

The “nation” in the ethnic model of national identity, however “can trace its roots to an imputed common ancestry and, therefore, its members are brothers and sisters, or at least cousins, differentiated by family ties from outsiders” (Smith, A. D., p. 12). The ethnic model of national identity emphasizes presumed descent rather than territory. The most distinguishing feature of the ethnic model of nationhood is the emphasis on a community of birth and native culture. With the ethnic concept of national identity, whether people stay in the nation or emigrate to another, they remain members of the nation.

Given the complexity of the concept of national identity and the conflicting views of national identity in Taiwan, it is very difficult to grasp teachers’ sense of national identity simply by asking them: “What is your national identity?” In order to elicit and accurately portray teachers’ views of national identity, therefore, I explore three aspects of teachers’ political orientations: political party preferences, their understanding of their own ethnicity (Chinese/Taiwanese), their attitudes about Chinese/Taiwanese culture, and their views of the future of Taiwan (unification vs. continued separation). In the context of Taiwan, these three dimensions of views can reflect one’s national identity.

### **Three Teachers’ Political Orientations and National Identities**

Ms. Chen and Ms. Hu share a common Chinese identity, asserting that Taiwan is part of China and rejecting the idea of Taiwanese independence. By contrast, Mr. Lin, a Taiwanese independence activist, has a Taiwanese identity. In what follows, I focus on political party preference and ethnic self-identification. By investigating these two

aspects of political orientation, I am able to differentiate between Ms. Chen's and Ms. Hu's Chinese identities and Mr. Lin's Taiwanese identity.

### **Political Party Preference**

Ms. Chen is a KMT supporter; Ms. Hu supports the New Party. Mr. Lin supports the DPP and the Taiwanese National Party. Each one's political party preference is closely linked to their view of national identity. This not surprising: Political parties in Taiwan often represent different views of nationhood and, consequently, national identity.

During my interviews, Ms. Chen never explicitly revealed her political party preference. I made the inference that she supported the KMT based on her criticisms of the DPP and her defense of the KMT in her reflections on the 2/28 incident. Consider her criticisms of the opposition:

Most of the opposition are family members of the victims of the 2/28 incident. I feel sorry for them; they are really unfortunate. However, since the tragedy took place in the past, if you understand "what is history," you would realize that historical events are always out of our control. We do not need to cry over spilt milk. When you evaluate a political party, such as the KMT, its outstanding contributions to society and to the nation, you cannot only look at a single flaw, for example, the 2/28 incident. It is unfair, based on that single flaw, to negate all of the KMT's distinguished service to Taiwan over the past several decades. I do not support the way that the opposition always memorializes the 2/28 incident, trying to make people believe that "the KMT is vicious." It is true that no political party is perfect; small defects and strong points coexist in all political parties. That is normal. (Chen, I # 4, 2/5/98)

In contrast to her supportive attitude towards the KMT, Ms. Chen's criticisms of the DPP was explicit and harsh. Her objections to the DPP were extreme, and closely related to her view of national identity. Without my prompting, Ms. Chen voluntarily criticized the DPP. She used the phrase "those radical activists" to label DPP members and described DPP supporters as "politically innocent, illiterate, and uninformed" (Chen,

I # 4, 2/5/98). Her major objection to their position lies in her disagreement with the DPP's assertion of Taiwanese independence, which she described as "irrational," for it fundamentally denies the historical fact that Taiwanese peoples' ancestors emigrated from China, and, therefore, as she saw it, Taiwan is part of China. She argued that, "according to Taiwan history, our ancestors emigrated from the mainland<sup>12</sup> to Taiwan, therefore, Taiwan has always been part of China, historically and geographically. This is an unquestionable fact (Chen, I # 1, 9/12/97).<sup>13</sup>

Ms. Chen also condemned the DPP's refusal to use the national symbol of the ROC, and to speak Mandarin in public:

They (the DPP) promote a Taiwanese consciousness and they only speak Taiwanese. They do not like to speak our national language. They also refuse to sing our national anthem in meetings. Moreover, they do not use "the Republic of China" as our national name. I never accept things like this that the DPP advocates. (Chen, I # 3, 11/24/97)

---

<sup>12</sup> Political orientation is difficult to determine, especially in research like this one. First, I was a stranger to these teachers. Moreover, as I already mentioned, they taught in schools in which parents had been known to complain about teachers' political talk. To get a sense of their political orientation, I paid attention to the subtlety in terminology that they adopted. I carefully examined the participants' language to determine their political orientations. For example, in Ms. Chen's case, whenever Ms. Chen mentioned the Chinese mainland, she used the term *da-lu* (it means the mainland or big continent) instead of the national name of the PRC or China. In addition, when she used the term "China," it was clear that she did not mean the PRC but the ROC. This way of referring to the PRC or China is common among Taiwanese as a result of KMT indoctrination. However, Taiwanese nationalists consciously attest to the KMT's ideological use of terminology and refuse to follow their lead. For instance, Mr. Lin never used the terms "the mainland" and "the Chinese communists" when he mentioned the PRC; rather, he referred to the PRC as "the PRC" or even "China." The KMT's choice of terminology results from its political ideology, emphasizing the ROC as the legitimate representative of China and resisting the reality that its lost territory has long been the PRC's national territory.

<sup>13</sup> To many Americans, the logic expressed by Ms. Chen might sound irrational. However, this is what both Ms. Chen and Ms. Hu believe, in accordance with their ethnic concept of national identity.

Ms. Chen's third objection to the DPP concerned the fact that, in her eyes, the Taiwanese consciousness advocated by the DPP is intended to create tension between mainlanders and Taiwanese, thus alienating the mainlanders. Ms. Chen, whose son-in-law is a mainland, appeared angry and bitter over the issue of provincialism (*sheeng-jir wen-tir*) among Taiwanese and mainlanders:

By advocating a Taiwanese consciousness, they (the DPP) divide the population of Taiwan into two categories, they-*wai-sheeng rern* and we-*tai-wan rern*. In my view, the whole population of Taiwan is Taiwanese. They (mainlanders) have lived on this island for almost 50 years and they have already developed their identity as Taiwanese.<sup>14</sup> However, they (Taiwanese independence activists) say that *wai-sheeng rern* are not *tai-wan rern* (Taiwanese people) and thus alienate them. My daughter is married to a *wai-sheeng rern* (mainlander). How do you label my grandson? Is my grandson a *wai-sheeng rern* (mainlander) or a *tai-wan rern* (Taiwanese people)? (Chen, I # 3, 11/24/97)

Obviously, Ms. Chen objects to the DPP and supports the KMT because the DPP asserts Taiwanese independence. Ms. Chen's sense of Chinese identity stands out explicitly in her criticisms of and her objections to the DPP. Two themes are essential to understanding her Chinese identity. In Ms. Chen's eyes, first, the Taiwanese people's ancestors are Chinese immigrants. Therefore, Taiwan is part of China. Second, the ROC national symbols, such as the national anthem, Mandarin as the national language, and the national name of the ROC, represent China itself and should not be replaced.

When studying in normal school, as part of a required military training course where her military officers persuaded students to join to the KMT, Ms. Chen became a KMT member.<sup>15</sup> However, after her graduation, she withdrew from the KMT, seeking to

---

<sup>14</sup> In fact, a 1995 survey found that of 169 mainlanders, only 13 of them (8 %) identified themselves as Taiwanese. By contrast, 95 (56 %) identify themselves as Chinese and 62 (37%) maintained that they were both Taiwanese and Chinese (Lin, 1996, p. 11).

<sup>15</sup> A feature of Taiwan's secondary and higher education is the continued existence of

avoid offending her father because she knew her father did not like the KMT. Her father was a policeman during the era of Japanese rule as well as the first decade of KMT rule over Taiwan. In the 1950s, he resigned his position because he “found it very hard to work with mainlander officers who were more corrupt than Japanese officers” (Chen, I # 3, 11/24/97). Her Taiwanese roots and her father’s political stance, however, do not seem to play significant roles in her political orientation. Ms. Chen reported that her political orientation has mainly been shaped by school:

In schools, we were told that we could recover *da-lu* (the Chinese mainland) and save our Chinese siblings from the oppression of the Communists. Textbooks and teachers often emphasized that we (the Taiwanese) should fulfill the mission of recovering the mainland and achieving Chinese unification. I believed in this idea because we (the Taiwan and the Chinese on the mainland) are all Chinese. (Chen, I # 3, 11/24/97)

Ms. Hu also has a Chinese identity but she supports the New Party. During our interviews, Ms. Hu volunteered that her whole family has supported the New Party since its formation. Influenced by her father, Ms. Hu criticized the KMT chairman, Lee Teng-hui, because she believes that Lee is inclined towards Taiwanese independence rather than Chinese unification. Ms. Hu appreciates the New Party (a splinter group of the

---

military training courses in high schools, colleges, and universities. The instructors who teach the courses are military officers. As one professor commented: “The military training courses have their historical roots in KMT’s authoritarianism. Initially, they (military officers) were there to help implement martial law. The officers were supposed to control the students’ thinking and activities, in an attempt to maintain stability on campus” (Her, 1997, p. 34). However, military instructor considers themselves and the military training course is important because “the military instructors remind students of the importance of national defense” (Her, 1997, p. 34). Through the 1950s until the early 1990s, one of the military instructors’ responsibilities was to recruit students to join the KMT. In recent years, due to democratization, the opposition has protested that political parties should not have offices in schools; as a result, KMT school offices, although remains, have been transformed into student associations, hiding the signboards of KMT offices on campus.



KMT) because “they assert a ‘one China’ policy and they really devote themselves to pursuing Chinese reunification under the authority of the ROC” (Hu, I # 2, 9/13/97).

Asked how the goal of Chinese reunification could be reached, Ms. Hu said:

The New Party asserts that we (the ROC) can assist *da-lu* (the mainland) to direct them toward a democracy with our experience of democratization in Taiwan. As long as they (the PRC) transform themselves into a democracy, then we (the ROC) will join them and Chinese in the two sides of the Taiwan Strait will be united as “one China.” (Hu, I # 2, 9/13/97)

Ms. Hu supports the New Party because she agrees with the New Party’s one China policy and she believes that the New Party sincerely wants to carry out its one China policy through actively triggering China’s democratization. Ms. Hu sees the New Party as the only party devoted to carrying out the will of the two previous presidents, Chiang Kai-shek and Chiang Ching-kuo.

Ms. Hu also appreciates the New Party because it attempts to foster more exchanges of culture, economy, and technology between Taiwan and the mainland, and New Party members actively visit the leadership on the mainland, trying to create links between the two sides. Ms. Hu believes that through these exchanges, Taiwan can come to play a role that will have a significant influence on the mainland.

With respect to the issue of Chinese unification, Ms. Hu appears optimistic, believing that since the PRC has adopted capitalism since the 1980s, there is a hope that China will grow into a highly significant world power in the next century. She emphasizes that, if the PRC were to transform itself into a democracy, she would be very happy to become a citizen of this powerful country. She believes that the emergence of a unified China would be of mutual benefit to Chinese on both sides of the Taiwan Strait. She hopes for Chinese unification because she wants to become a citizen of this very





powerful country, China:

Taiwan is too small to become an influential power in the international community. I hope someday that I can become a citizen of a powerful country. They (the PRC) are promising to be one of the great powers in the next century. Therefore, I expect that they (the PRC) could transform themselves into a democracy, then we (the ROC) would be very happy to join them. When Taiwan joins the mainland and the two areas are unified into one China, it may happen that this unification would require us (Taiwanese) to undertake a heavier tax burden than before in order to help other provinces in China. I would accept this so that the Taiwanese could help the whole of China to become a powerful country. In addition, under unification, Taiwan could help the mainland in its economic development, with Taiwan's rich experiences in economical development. I believe that Chinese unification would be good for us (Taiwanese), that we (Taiwan) would become a part of a powerful country instead of a small island which needs to rely on other powers. (Hu, I # 2, 9/13/97)

As a supporter of the New Party, Ms. Hu agrees with the New Party's platform that advocates a one China policy and intensive exchanges -- in terms of culture, economy, and technology -- between Taiwan and the mainland. She believes that the New Party's platform is more effective than the KMT's one China formula with respect to the pace of Chinese unification. Ms. Hu has been disappointed with KMT proposals for Chinese unification.

Questioned further about the differences between the KMT's and the New Party's one China policy, Ms. Hu contended that the KMT policy would create a situation of "one China, two states," which would leave China a divided country and would function to postpone full Chinese unification:

The KMT's one China policy emphasizes the idea of "two political entities," the mainland and Taiwan.<sup>16</sup> In my eyes, two political entities means "two states" or

---

<sup>16</sup> Her understanding of the KMT's notion of "one China, two political entities" is based on the KMT's official document Guidelines for National Unification. The ROC on Taiwan and the PRC are defined as "two political entities" and "both Taiwan and the Chinese mainland are constituent parts of a single China. . . . Taiwan and the Chinese mainland are two distinct areas under the jurisdiction of two different political entities"



"two Chinas." Lee Teng-hui skillfully uses this formula to maintain Taiwan's status as a sovereign state, intending to the unification; he pays lip service to Chinese unification. To me, the idea of "one China, two political entities" is strange. I believe that a unified China is "one China, one state." The idea of "two political entities," means a divided China with two governments; two parts of China, Taiwan and the mainland, are still separated from each other. I believe that this is not the best situation for all Chinese in Taiwan and on the mainland, because only a unified China can create well-being for all Chinese in the world. (Hu, I # 3, 11/24/97)

Ms. Hu's distinction between the KMT's one China policy and that of the New Party serves as the primary standard to determine her preference for the New Party. As she asserted support for Chinese unification, she did not mention how much she objects to the DPP's advocating Taiwanese independence.

During our interviews, Ms. Hu did not directly criticize the DPP. She termed them "a political group" and "some politicians"; she never called them "the DPP" or "Taiwanese independence activists." One clue, however, that indicates that she objects to the DPP was when she mentioned the issue of provincialism, claiming that mainlanders and Hakka were alienated by the Taiwanese; she connected this to the DPP's strategy to win elections:

In each election, a *political group* raises some slogans, dividing the society into two groups, Taiwanese and mainlanders, to effectively mobilize Taiwanese people to vote for this political group. Originally in our society, there was no tension between Taiwanese and mainlanders. However, since the emergence of this political group, provincialism has been intensively emphasized whenever elections are held. (Hu, I # 3, 11/24/97, emphasis added)

Although Ms. Hu did not directly indicate that she objected to the DPP, this can be inferred from her criticism of Taiwan independence. Ms. Hu insists that since Taiwanese people share a common Chinese lineage with their mainland siblings, there is

no reason for Taiwan to seek independence:

Taiwanese people and Chinese are linked to each other by blood and flesh. Moreover, it is a fact that we (Taiwanese and Chinese) share a common culture, language, customs, and way of thinking. Therefore, it is not reasonable for Taiwan to want to become an independent country. (Hu, I # 2, 9/13/97)

Although the KMT does assert one China policy and claim an established Chinese unification of Taiwan and the mainland as a goal to carry out at the appropriate time, Ms. Hu however, is not satisfied with the KMT's approach to Chinese unification, which she sees as too passive. Through this examination of Ms. Hu's political preferences, three major themes emerged that are linked to her Chinese identity: First, and most fundamentally, Taiwanese people share the same Chinese lineage and culture with the Chinese on the mainland, therefore, Taiwan is part of China. Second, Chinese unification between Taiwan and China would benefit Chinese in Taiwan and the PRC. Third, Taiwan, as democratic and capitalist society, should help the PRC in its democratization and economic development.

Ms. Hu's political orientation has been influenced by her father, who followed the KMT in their retreat from China to Taiwan. "He asserts that Taiwan should be unified with its motherland. He came from the mainland and he never forgets his root. His Chinese identity is stronger than ours" (Hu, I # 2, 9/13/97). Ms. Hu's father often discusses politics with his children at home. According to Ms. Hu, her father's comments on current affairs often serve as her best sources for Ms. Hu believes that her father is sensitive about politics and able to grasp subtleties. Ms. Hu indicated that even while Lee Teng-hui repeatedly announced his commitment to unification, her father is able to look into Lee's mind and evaluate Lee as "pro-independence" (Hu, I # 2, 9/13/97).

Although Ms. Hu's political party preference is different from that of Ms. Chen, both share the same view of Chinese identity, emphasizing the significance of the historical roots that the Taiwanese people share in common -- blood and culture -- with mainland Chinese. This kind of identity can be understood as identification or "sameness" (Smith, A. D., 1991, p. 75). Members of a particular group define their membership by shared characteristics. Ms. Hu and Ms. Chen emphasize the sameness -- Chinese lineage and culture -- shared by the Taiwanese and Chinese peoples which is used as a justification for why Taiwan should not be separated from China.

In contrast, Mr. Lin is clearly a Taiwanese independence activist who supports the DPP and the Taiwanese Independent Party. Mr. Lin objects to both the KMT and the New Party, and he believes that the one China policy creates confusion concerning national identity among Taiwan citizens. He especially worries that Chinese identity might help the PRC swallow Taiwan:

The KMT government holds the same idea as the PRC in terms of the concept of a *jung-hua ming-tzu* (the ethnic Chinese nation). The existence of the "ethnic Chinese nation" is invented to promote the ethnic concept of Chinese nationalism. Both the PRC and the KMT emphasize the idea of shared common ancestors to advocate "one China," promoting Chinese unification between Taiwan and China. Textbooks emphasize the Chinese ethnic concept and, consequently, students believe that Taiwan and China are in the same country and that China is their motherland. With this kind of schooling, most Taiwan citizens are confused about their national identity. Isn't it ridiculous that our textbooks persistently promote Chinese identity, which is exactly parallel to the PRC's claim to Taiwan? In case China attacks Taiwan, how can our citizens defend Taiwan from their invasion? (Lin, I # 2, 9/18/97)

In addition, Mr. Lin indicated that the KMT government has intentionally instilled a mistaken identity in people on Taiwan by claiming the legitimacy of the ROC to represent China. In order to compete with the DPP's assertion of Taiwanese

independence, the KMT government claims that the ROC is a sovereign state. Thus, it is unnecessary to seek independence. Mr. Lin does not agree. The KMT government still defines Taiwan as a province of China or a province of the ROC (not a country). Mr. Lin is not satisfied with this conception of Taiwan. He agrees that Taiwan is relatively independent from the PRC, but he seeks a Republic of Taiwan, which would not be claimed as part of China at all.

Mr. Lin contends that the KMT government has continuously denied the reality that its previously lost territory on the Chinese mainland has been the national territory of the PRC since 1949, and the fact that the international community refers to China as the PRC, not the ROC. However, the KMT government in its official documents, media, and textbooks, has never told Taiwan citizens the reality faced by Taiwan:

Irrespective of the fact that the ROC government moved to Taiwan 50 years ago, and the ROC has not been acknowledged by the international community as a sovereign state representing China since the 1970s, the ROC government still claims that the ROC represents China, and that Taiwan is a province of the ROC (or “China”). The KMT government defines *the* “China” loosely as *the* China that is a trinity of Chinese historical land, Chinese history, and Chinese lineage, shared by all Chinese in Taiwan and in China. This is a ridiculous way to define the traits of a country in the modern world. It is a reality that the international community and the PRC exclusively refer to China as the PRC. In this sense, the KMT’s view of Chinese identity and its one China policy hardly creates room for Taiwan to maintain its dignity and its struggle for survival as a sovereign state under this reality.

Moreover, the KMT government continuously hides the reality to our people. For instance, the map showing the national territory of the ROC in textbooks maintains the previous ROC national territory before 1949 in which the Chinese mainland is included. Another instance comes from the terminology used by the KMT government to identify the status of the ROC and the PRC. With respect to efforts made to maintain the ROC as a sovereign state representing China, the KMT government carefully refers to Taiwan as the ROC or China in the domestic media and also in the translations of foreign news and documents in which Taiwan is authentically referred to as Taiwan by the international community. With the respect to the efforts made to deny the reality that the PRC controls the Chinese mainland and is the legitimate government of China, which has long been

acknowledged by the international community, the KMT government refers to the PRC as the Chinese communists, the mainland, and China with quotation marks, to imply that the PRC is not the legitimate government of China. Cheated by these strategies, Taiwanese people have been confused about their national identity. Is there a government in the world like the KMT government who continuously lies to its nationals about who they are and the national territory which they belong to? (Lin, I # 4, 1/19/98)

Mr. Lin fervently denounces the KMT's one China policy and its strategy of molding a Chinese identity that serves to blur Taiwanese people's vision of their national identity. Mr. Lin also objects to the New Party and the way it advocates Chinese unification:

The New Party argues that Taiwan is not a sovereign state and claims that Taiwan is part of China.<sup>17</sup> By these assertions, the New Party mobilizes voters who are pro-Chinese unification in elections. I believe that the "great China" consciousness that insists on reaching the goal of Chinese unification does not benefit the Taiwanese people. The reality faced by Taiwanese people is clear, that the PRC claims Taiwan as its province. Taiwan has been separated from China for 50 years -- or 100 years if the 50 years of Japanese rule is included -- and has developed into a democratic society. It is impossible for us (Taiwanese people) to move back to a stage that allows the kind of one-party dictatorship that represses our dignity and liberty. (Lin, I # 2, 9/18/97)

Four essential themes emerge in Mr. Lin's criticisms of the KMT and the New Party and his assertion of Taiwanese identity. First, China is referred to as the PRC and Taiwan is not part of China. Second, the KMT's claim that the ROC legitimately represents all of China does not reflect reality. Third, a well-defined sense of Taiwanese identity is important to Taiwan's survival. Fourth, the entire population of Taiwan shares a common destiny and needs to regard Taiwan as their motherland.

---

<sup>17</sup> Officially, Taiwan is one of the provinces of the ROC, therefore, the KMT government and the New Party deny that "Taiwan is a sovereign state," which is understood by the KMT government and the New Party as an expression of Taiwan's independence. From their point of view, the term "Taiwan" is regarded as a geographical term and it cannot be used as the country's name. In official documents and media, the correct expression for

To sum up, I have sought to explain the conflicting views of national identity by analyzing the three participants' political party preferences. To this end, I have investigated each participant's view of national identity, including their views of relationship between Taiwan and China, the future of Taiwan, and Taiwan's status as a province or a sovereign state. I characterize each participant's national identity according to the political elements of their ideologies on a macro level. While political party preference gives us some indication of each teacher's national identity, several things remain unclear. For instance, what is "Chinese identity"? "Taiwanese identity"? To provide greater clarity, I now focus on two components of national identity: how the teachers define themselves in terms of Chinese/Taiwanese identity and their views of Chinese/Taiwanese culture and languages.

### **Who we are? Chinese? Taiwanese? Both?**

In the context of Taiwan, the two terms, Taiwanese<sup>18</sup> and Chinese have different connotations depending on an individual's identity. For instance, as a way of promoting Taiwanese consciousness, phrases such as, "It is the Taiwanese people's turn to manage our own destiny," "We are all Taiwanese," "It's the misery of being Taiwanese," have been used. Alternatively, phrases, such as, "We are all Chinese," "Chinese do not attack Chinese," "The 21<sup>st</sup> century belongs to us Chinese," have been used to promote Chinese identity. Some people identify themselves as exclusively Taiwanese while others identify

---

Taiwan is the Republic of China.

<sup>18</sup> In this study, "Taiwanese" is not identical to "the people of Taiwan." I exclusively use "Taiwanese" to indicate people who have ancestral origins in China's Fukien and Kwangtung provinces, including Holo (who speak Taiwanese) and Hakka (who speak Hakka). I use "the people of Taiwan" to refer to the entire population of Taiwan, including Taiwanese, mainlanders, and Taiwanese aboriginal tribes.





themselves exclusively as Chinese. As the surveys cited earlier make clear, others hold multiple identities, and see themselves as both Taiwanese and Chinese. Making clear what it means to be Taiwanese or Chinese for these individuals will help clarify their national identities.

### **The Multiple Identities of Ms. Chen and Ms. Hu**

Ms. Chen identifies herself as “Taiwanese” because she “was born to parents who are Taiwanese and she now lives in Taiwan” (Chen, I # 3, 11/24/97). Ms. Hu identifies herself as “Taiwanese” too, for she “grew up and now lives in Taiwan.”<sup>19</sup> In her view, the term “Taiwanese” refers to one’s residence: “Taiwan is a province of China. People who live in Taiwan can be addressed as ‘Taiwanese.’ Similarly, people who live in Fukien Province can be addressed as “Fukienese” and people who live in Taipei are ‘Taipei *rernrn*. ’” (Hu, I # 2, 9/13/97).<sup>20</sup>

For both women, the entire population of Taiwan can be referred to as Taiwanese because, the term refers to one’s residence. In addition to being Taiwanese (because they live there), Ms. Chen and Ms. Hu also identify themselves as *jung-guor rern* (citizens of the Chinese state) and consider this their national identity.

The term “Chinese” is a simple translation in English, referring to people who come from China.<sup>21</sup> However, in Chinese, the term “Chinese” can be understood as

---

<sup>19</sup> Ms. Hu’s mother is Taiwanese but she does not use her mother’s family roots as a reference for her identity. Instead, she focuses on her father’s family roots in China’s Jiang-su Province.

<sup>20</sup> In Chinese, *rern* literally means “people.” When *rern* is combined with the name of a country, it refers to one’s nationality; when it is combined with the name of a city or a village one lives in, it refers to one’s provincial identity.

<sup>21</sup> Since the establishment of the ROC in 1912, the KMT -- in an effort to consolidate

either *huar-vern* (overseas Chinese or ethnic Chinese) or *jung-guor vern* (citizens of the Chinese state). To make clear what they mean by Chinese, I asked Ms. Chen and Ms. Hu about how they distinguish *huar-vern* from *jung-guor vern*. Both Ms. Chen and Ms. Hu indicated that *huar-vern* involves Chinese ethnicity and culture while *jung-guor vern* involves not only Chinese ethnicity but also one's nationality. Ms Chen explained:

*Huar-vern* are not necessarily *jung-guor vern*; *huar-vern* are people who share Chinese culture and Chinese lineage while they are not necessarily citizens of the Chinese nation-state. *Jung-guor vern* not only share Chinese culture and Chinese lineage but also share a nationality as citizens of China. (Chen, I # 3, 11/24/97)

Demonstrating their knowledge of the connotation of *huar-vern*, both Ms. Chen and Ms. Hu volunteered examples that served to illustrate what they meant by *huar-vern*. Both specified that Lee Guang-yuah, the formal Singapore president, was *huar-vern*. Both explained to me that because Lee's nationality was Singaporean, he was not, of course, *jung-guor vern*. I then asked each which term they would use to identify themselves. Both said that they identified themselves as *jung-guor vern*. For them, three

---

diverse people within territorial China into a single nation -- invented the concept of *jung-huar ming-tzu* (Chinese as an ethnic category). According to the KMT's political doctrine, the Three Principles of People, the *jung-huar ming-tzu* is composed of Han, Manchu, Mongolia, Huie, and Tibet people and all share the same ancestor -- the Yellow Emperor. Moreover, Sun Yat-sen, the ROC national father, advocated Chinese nationalism, asserting that China is a nation-state which is exclusively composed of the single ethnic nation, *jung-huar ming-tzu*. The difference between the two terms (*jung-guor vern* is a civic concept while *jung-huar ming-tzu* is an ethnic concept) has never been defined. Thus, the two terms are used interchangeably (Chun, 1994; Juang, 1996). Because of its vagueness, overseas Chinese who are already other countries' citizens also refer to themselves as *jung-guor vern* (citizens of Chinese state). Recently, a term *huar-vern* is adopted to refer to overseas Chinese, emphasizing their Chinese lineage and Chinese cultural attributes. Thus, we know Chinese can be interpreted in two ways: *jung-guor vern* (emphasizing the identity of being citizens of Chinese state) and *huar-vern* (emphasizing the identity as citizens of other countries). However, influenced by Sun Yat-sen's ethnic concept of national identity, overseas Chinese often refers themselves *jung-guor vern* (citizens of Chinese state).

features are fundamental to being *jung-guor rern*: Chinese culture, lineage, and being a ROC citizen. Ms. Chen noted:

I am *jung-guor rern* because I have a Chinese lineage and I love Chinese culture. In addition, I am a citizen of the ROC. When I traveled overseas I told people that “I am *jung-guor rern* and I come from Taiwan.” Because there are two groups of *jung-guor rern* in this world, one living in Taiwan and another living in the mainland, I need to tell people where I live now. (Chen, I # 3, 11/24/97)

Similarly, Ms. Hu identified herself as *jung-guor rern* and her nationality is China. She saw no conflict between being both Chinese and Taiwanese because for her, Taiwan is part of China:

With Chinese culture and lineage, I am *jung-guor rern*. Chinese on Taiwan and on the mainland are all *jung-guor rern*. My nationality is China and I live in Taiwan. Because Taiwan is a province of China, it is reasonable to say that I am Taiwanese and also *jung-guor rern*. My identity as both Taiwanese and Chinese is very similar to the situation of an American who lives in California and says that he or she is a Californian and also an American. (Hu, I # 3, 11/24/97)

Ms. Chen and Ms. Hu both assert that Chinese in Taiwan and in China are all *jung-guor rern*, sharing the same nationality. For both, being citizens of the ROC and sharing a Chinese culture and lineage are essential to the formation of their Chinese identity. Each holds multiple identities, identifying themselves as Taiwanese in terms of residence and *jung-guor rern* in terms of national identity. They can hold these dual identities without contradiction because they see Taiwan as part of China. The national identity of these two teachers reflects the KMT view of identity.

### **Mr. Lin: A Single Taiwanese Identity**

Adopting a civic concept of national identity, Mr. Lin defines himself exclusively as Taiwanese. He asserts that the entire population of Taiwan, including Taiwanese (Holo and Hakka), mainlanders, and aboriginal tribes, are “neo-Taiwanese,”

distinguishing them from *jung-guor rern* (citizens of the Chinese state). Mr. Lin believes that Taiwan can be a *de jure* country, with its own sovereignty, political system, social norms, and culture. He claims that the development of the identity “neo-Taiwanese” is possible given the fact that Taiwan is the home of the “neo-Taiwanese” and the fact that “all of the population of Taiwan share the common destiny of sitting in the same boat” (Lin, I # 1, 9/5/97). He also noted that the formation of a “neo-Taiwanese” identity is vital to the survival of Taiwan, especially in the face of the PRC’s military threats.

Mr. Lin defines himself as *huar-rern* (ethnic Chinese), insisting that he is not *junn-guor rern*: “Because my ancestors came from China and our life is full of Chinese culture, I am *huar-rern*. As *huar-rern*, surely, I am not a *jung-guor rern*. *Jung guor rern* are citizens of the PRC” (Lin, I # 3, 12/11/97). In contrast to Ms. Chen’s and Ms. Hu’s emphasis on the Taiwanese people’s ancestral home in China and the way that they see Taiwan as inseparable part of China, Mr. Lin asserts that sharing a Chinese culture and lineage is not sufficient for tying Taiwan and China together as one country:

It is true that people in Taiwan share a culture and lineage with the Chinese in China. But the fact that our ancestors are immigrants from China is not a sufficient condition to claim that Taiwan is part of China. Let me give you an example for making clear what I mean by making a distinction between Taiwanese and *jung-guor rern*: Americans are mostly immigrants from other countries such as England, but do their descendants who now live in the United States claim that the United States is part of British and that they are citizens of British? (Lin, I # 3, 11/24/97)

As we have seen, both Ms. Hu and Mr. Lin drew upon analogies with the same country -- the United States -- in order to make their point. In Ms. Hu’s analogy, the relationship between Taiwan and China is regarded as similar to the relationship between California and the United States: California is a U. S. state. Ms. Hu argues that

Taiwanese are Chinese, therefore, Taiwan is part of China. Mr. Lin drew a different analogy. He pointed to U. S. history, emphasizing the fact that Americans do not identify themselves as citizens of the countries from which their ancestors emigrated. By focusing on U. S. independence, Mr. Lin argued that, regardless of the fact that the majority of Taiwanese people are the descendants of Chinese immigrants, Taiwanese people could exercise their right to establish their own country, just like the colonials established the United States. Mr. Lin admits that Taiwanese people are *harh-rern*, acknowledging the attributes of Chinese culture and lineage. However, he emphasizes a civic concept of national identity. For him, shared Chinese culture and lineage is not a sufficient condition upon which to base the claim that Taiwan is part of China; rather, he sees the common destiny shared by the entire population of Taiwan as the primary condition for the establishment of a new country. The example of the United States gives Mr. Lin a vision of a civic state. Mr. Lin's civic concept of national identity is quite different from Ms. Hu's and Ms. Chen's ethnic view.

Mr. Lin's Taiwanese identity emphasizes a sense of common community shared by people who are living in a given national territory rather than a cultural and ethnic identity closely related to ancestral origin. There are several significant features of Mr. Lin's Taiwanese identity: To him, China means the PRC and the PRC exclusively represents China. Taiwanese are not *jung-guor rern* (citizens of the PRC). Taiwan is not part of China. The population of Taiwan is composed of four groups of people, including Taiwanese, Hakka, mainlanders, and aboriginal tribes, who need to mutually respect one another and cooperatively develop a shared "neo-Taiwan" identity.

### **Attitudes Toward Culture and Language**

Both Ms. Chen and Ms. Hu identify themselves as “Taiwanese” because they are residents of Taiwan. Mr. Lin advocates a concept of neo-Taiwanese to develop a sense of common destiny among Taiwan’s four ethnic or linguistic groups. He believes that the idea of neo-Taiwanese would be able to facilitate to make Taiwan a sovereign. On some level, it seems that all three participants share the identity of being Taiwanese. However, they have different attitudes toward Taiwanese culture, including the Taiwanese language. Corresponding to Ms. Chen and Ms. Hu’s Chinese identities, they both regard the Chinese culture as the national culture of Taiwan and Taiwanese culture is an affiliated folk culture. Conversely, Mr. Lin sees Taiwanese culture as unique, distinguishable from Chinese culture and at the heart of Taiwan, not on the fringes.

Smith, A. D. (1991) identified a common mass public culture as an essential element of national identity, arguing that mass public culture as being made up of “common historical memories, myths, symbols, and traditions” generated by a “set of common understandings and aspirations, sentiments and ideas” (p. 11). This conception of culture focuses on the origin of culture that is supported by history, myths, symbols, and traditions. However, mass culture goes beyond this conception. Anthropologists, for example, define culture as a “pattern of life within a community -- the regularly recurring activities and material and social arrangements” and as “an organized system of knowledge and beliefs” (Kessing, 1981, p. 68).

In the response to my questions concerning the difference between Taiwanese and Chinese culture, both Ms. Hu and Ms. Chen consider Taiwanese culture to be affiliated with Chinese culture. For them, Chinese culture is Taiwan’s mainstream culture:

I do not think that there is a culture that can be specified as “Taiwanese culture.” It is a historical fact that our ancestors emigrated from *da-lu* (the Chinese mainland) and they brought Chinese culture here. Naturally, our lifestyle, ideas, and social values are all derived from Chinese culture. For instance, the Taiwanese and Hakka spoken in Taiwan are the same as that spoken by the people of the Fukien and Kwangtung provinces. (Chen, I # 3, 11/24/97)

Ms. Chen believes that Taiwanese culture is the same as Chinese culture, therefore, she argues that the so-called “Taiwanese culture” does not really exist.

Ms. Hu also considers Taiwanese culture to be Chinese culture and, for her, it is not necessary to label the existing culture as Taiwanese. Like Ms. Chen, Ms. Hu pointed to the fact that Taiwanese people’s ancestors had emigrated from the mainland, thus, it is natural that Taiwanese culture would share many features of Chinese culture.

Although neither chooses to separate Taiwanese from Chinese culture, when they do distinguish between the two, they view Taiwanese culture negatively. Ms. Chen claimed that Taiwanese culture is backward:

If you want me to specify a culture that can be recognized as “Taiwanese culture,” it would be the aboriginal cultures. Except that, the so-called “Taiwanese culture” is negative. For instance, some Taiwanese farmers, laborers, and gangsters like to chew betel nut, spitting out the blood-like juice on the ground. In my view, they are not civilized. In addition, Taiwan’s politicians are involved with gangsters and money. These features in politics, corruption and violence, represent another illustration of the so-called “Taiwanese culture.” (Chen, I # 3, 11/24/97)

Ms. Hu believes that, although Taiwanese culture mainly comes from Chinese culture, due to the period of Japanese rule, Taiwanese culture does not emphasize patriotism, which is an essential virtue in Chinese culture. She criticizes the Taiwanese as less patriotic than other Chinese:

Although Taiwanese culture is mainly Chinese, they still differ in some ways; the so-called “Taiwanese culture” lacks Chinese patriotism. I would guess that it is because of Japanese colonial rule, Taiwanese are not as patriotic toward our country. One time, one of my students told me that his grandfather still



appreciated the Japanese for what they had done to Taiwan during the era of Japanese occupation. You know, during the Anti-Japanese War on the mainland, Chinese sacrificed their lives to save the country, but some Taiwanese, such as that grandfather, under Japanese rule, did not resist the Japanese; Taiwanese people went so far as to appreciate Japanese rulers! (Hu, I # 4, 1/20/98)

In sum, Ms. Chen and Ms. Hu share a common attitude towards Taiwanese culture: Taiwanese culture is mainly seen as part of Chinese culture, not easily distinguishable. In addition, if differences between Taiwanese and Chinese culture are examined, Taiwanese culture appears to be negative, less civilized, even backward.

Conversely, Mr. Lin appreciates Taiwanese culture and describes it as unique and colorful. He believes that culture is changeable with time and context. He emphasized that, although Taiwanese culture was brought by Chinese settlers over 400 years, Chinese culture has been transformed by different ethnic groups with different historical experiences:

It is true that Taiwanese culture has mainly been influenced by Chinese culture. However, we cannot ignore the fact that culture can not exist separately from the context of people, space, and time. Culture is about people's ideas, lives, and values. Taiwanese culture comes from Chinese culture, but given the different people and different places where people live, naturally, Taiwanese culture is different from Chinese culture in some ways. For example, Taiwanese worship Ma-tzu for her blessing of the Chinese settlers to cross the Taiwan Strait safely during the era of emigration to Taiwan. Due to the historical experiences of Chinese settlers, Ma-tzu has been worshipped by the Taiwanese and has become a folk goddess of Taiwan. Moreover, the population of Taiwan is composed of four ethnic groups and each of them differs from the other in their historical experiences. Thus, Taiwanese culture is an integration of each group's different historical experiences. Prior to the arrival of Chinese settlers, Taiwanese aboriginal tribes already lived on this island and they possess rich legends and customs; Hakka and Holo then brought Chinese culture, languages, and customs to Taiwan. The Dutch and Spanish and then the Japanese also added color to Taiwanese culture. The latest immigrants are mainlanders, who came from a variety of provinces in China and they also brought their local cultures, adding still more color to Taiwanese culture. You see how colorful Taiwanese culture is. It has been formed over time by a variety of ethnic groups and by the soil of Taiwan. It is impossible to find another culture as colorful as ours in the world.

We should feel proud of our Taiwanese culture. (Lin, I # 3, 12/11/97)

Language is part of culture and, in particular, it is an indicator of identity.

Researchers argue that the choice of language can reveal speakers' expressions of identity (Le Page & Tabouret-Keller, 1985; Scollon, 1998). Language usage in Taiwan is often full of political significance and reflects one's political orientation. The memories of Taiwanese students being forbidden to speak their mother tongues in schools is one source of frustration that has reinforced a sense of Taiwanese consciousness (Chang, 1997; Wachman, 1994).

Over the past 50 years, the KMT has transformed Taiwan from what had been a Japanese colony into a Chinese society where Chinese culture is fully preserved and highly regarded through the educational system and media (Chun, 1994; Yang, 1992).<sup>22</sup> The process of culture-making was to reinvent a national identity in terms of Chinese lineage, culture, tradition, and history (Chun, 1996; Yang, 1992). Standard colloquial Mandarin served as an effective tool and a symbol of national culture for transmitting the official view of national identity to the public (Chang, 1997; Cheng, 1994; Chun, 1994; Wachman, 1994). On Taiwan, Mandarin is called *guor-yu*, (the national language), an

---

<sup>22</sup> As a part of efforts to reintegrate Taiwanese into the Chinese fold, the KMT implemented a strict language policy that the media was forced to follow in past decades. An education professor recalled how the media was used to promote the KMT's language policy: Television was first aired (in Taiwan) in 1962 and Taiwanese shows were most popular, which caused some jealousy. So, in 1972, the government ordered that no television station could air more than one hour of Taiwanese-language programs per day and that hour had to be broken up into two segments at lunch time and in the evening. During the 6:30 p. m. prime-time hour, only one of the three stations (Taiwan, at that time, only had three TV stations and all of them were KMT-supported) could air a Taiwanese-language program. In 1976, another rule was passed which stipulated that all television shows had to be in Mandarin and that shows in Taiwanese would be gradually phased out over the coming year (Wachman, 1994, p. 107).

expression that emphasizes nationalist sentiment. Rustow (1967) claims that linguistic unity could be a modern nation's most precious possession. In addition to achieving the aim of linguistic unity, the KMT's language policy sought to foster Chinese identity over and above other identities (Chang, 1997; Cheng, 1994; Chun, 1994; Wachman, 1994).

As a result of efforts to transmit Chinese culture to students, the KMT's language policy has been successful. Most citizens born after 1949 are not able to lecture fluently in their mother tongues. Mandarin is the major language spoken by the entire population, particularly the north. Currently, however, children learn to speak their mother tongues in schools, as well as English and other foreign languages (Cheng, 1994).

In the 1980s, DPP candidates spoke Taiwanese to distinguish themselves from KMT candidates and to mobilize voters. Similarly, to distinguish themselves from the opposition, KMT mainland legislators criticized those KMT legislators who spoke Taiwanese in conferences, making them the black sheep of the KMT. But in recent decades, due to Taiwanization, it has become more acceptable to speak Taiwanese and other native languages. Mainlander politicians have changed their attitudes toward the Taiwanese language and some of them have learned to speak it so as to gain voter support (Baum, 1990).

Given the centrality of language to culture and identity, it is worthwhile to investigate each informant's language usage and attitude towards standard Chinese Mandarin and Taiwanese languages. All three teachers are bilingual, able to speak Taiwanese and *guor-yu* (Mandarin) fluently. Both Ms. Chen and Mrs. Lin were born to Taiwanese parents. Ms. Hu learns Taiwanese from her mother, who was raised in Taiwanese. However, the participants vary in their attitudes towards the role of language

in their lives and language usage.

Ms. Chen mainly speaks Mandarin at home. For Ms. Chen, who speaks Mandarin with a decent accent, the purpose of speaking Mandarin at home is to enhance her children's capacity to easily adapt to the mainstream culture in schools and society where Chinese literacy is highly regarded. Ms. Chen insists that Mandarin is the national language and everyone should use it in public. For instance, she strongly objects to Taiwanese nationalists who she considers extremists and who advocate speaking only Taiwanese in public, rejecting Mandarin as a national language. She worries about the loss of Mandarin in daily life: "Recently, more and more people are not able to speak standard Mandarin with correct pronunciations of words and a decent accent."<sup>23</sup> The more often people speak Taiwanese, the poorer the quality of our Chinese literacy" (Chen, I # 3, 11/24/97).

Ms. Hu, whose mother is Taiwanese, is able to speak Taiwanese fluently. As a child, her father encouraged her to speak Taiwanese because the majority spoke Taiwanese and he saw it as a tool for communicating with local residents. Even though Ms. Hu is able to speak Taiwanese well, she agrees with Ms. Chen and prefers Mandarin. Ms. Hu, like Ms. Chen, also believes that she can discern the level of a person's

---

<sup>23</sup> Taiwanese and Mandarin are mutually unintelligible, sounding as different as English and Dutch or German, because the pronunciations and tones in Mandarin are totally different from that of Taiwanese. A tone is an integral part of a Chinese syllable. Mandarin speech moves in tonal rhythms with four tones. In contrast, Taiwanese, also a tonal language, possesses eight tones that are completely different. In addition, some pronunciations, such as labials and retroflexes (i. e., *shy* and *j*) for which the speaker must roll his/her tongue and place it in an appropriate position are difficult for Taiwanese speakers to reproduce. In schools, speech contests aim to promote standard Mandarin and it is rare for Taiwanese children to be evaluated as winners in these speech contests because of their accent.

education from their accent: Less educated people speak Mandarin with a Taiwanese accent. In fact, Ms. Hu explained that she had vowed not to marry a man who spoke Mandarin with a Taiwanese accent. For her, mainlanders, not Taiwanese, speak Mandarin with a decent accent and correct pronunciation and Mandarin is a sign that distinguishes Taiwanese from mainlanders. She recalled that, as a child, she had a sense of pride telling people that she was a mainlander because she believed that mainlanders were better educated and members of the middle and upper-middle class.

Mr. Lin appears neutral towards the issue of languages. He speaks both Taiwanese and Mandarin at home.<sup>24</sup> While he believes that language is essential to preserving one's ethnic and cultural identities, he also believes that a common language is necessary in a multicultural society. Thus, he believes that Taiwan's native languages -- Taiwanese, Hakka, and aboriginal languages (aboriginal languages include nine to ten different languages) -- should be preserved as essential parts of Taiwanese culture, especially in a society where Mandarin has been adopted as the dominant language.

In sum, even though both Ms. Hu and Ms. Chen consider themselves "Taiwanese," neither sees any beauty in the Taiwanese language and each strongly preserves an attachment to the mainstream culture that has been emphasized by the KMT. Both focus on the importance of a shared Chinese culture and lineage for the preservation of Chinese identity. By contrast, Mr. Lin focuses on the linguistic and cultural components of the territory of Taiwan as the home of the "neo-Taiwanese" and the uniqueness and richness of Taiwanese culture and Taiwanese identity.

---

<sup>24</sup> Mr. Lin reported the language use with his family members. During one interview, I observed him make a call, speaking with his son in both Taiwanese and Mandarin.

Clearly, the three teachers vary in how they conceptualize the meaning of nationhood and national identity, even in terms of the language they recognize and value.

In the following section, I focus on the teachers' subject matter knowledge and the beliefs that they possess, which may affect their teaching. I begin with a conceptual framework of subject matter knowledge.

### **Subject Matter Knowledge**

Claiming that subject matter represented a "missing paradigm" in research on teaching, Shulman (1986) emphasized the importance of subject matter for the study of teaching:

The teacher needs not only to understand *that* something is so; the further understand *why* it is so, on what grounds its warrant can be asserted, and under what circumstances our beliefs in its justification can be weakened and even denied. (Shulman, 1986, p. 9)

Research on subject matter knowledge (Ball & McDiarmid, 1990; Grossman, Wilson, & Shulman, 1989; Grossman, 1990; Shulman, 1986; Wilson, 1988) conceptualizes subject matter knowledge in various ways. For instance, Ball and McDiarmid (1990) have suggested that subject matter knowledge includes both substantive knowledge *of* the subject and knowledge *about* the subject. The former refers to the content of a subject area, including specific information, ideas, concepts, theories, principles, and topics. The latter refers to understanding about subject matter, for example, the relative validity and centrality of different ideas or perspectives, the major disagreements within the field, and how claims are justified and validated.

Although there are various explanations of subject matter knowledge, researchers have come to distinguish four aspects of subject matter knowledge (Grossman, Wilson, &



Shulman, 1989; Grossman, 1990; Wilson, 1988):

Knowledge of content within a field refers to facts, concepts, theories, principles, and procedures; knowledge of substantive structures is the knowledge of the ways in which the ideas, concepts, and facts of a discipline are organized by theories, key principles, and explanatory frameworks of the discipline; knowledge of syntactic structures refers to an understanding of the rules of evidence and proof that guide inquiry in a discipline -- the ways of establishing new knowledge and determining the validity of claims; and beliefs about the discipline.

Historical understanding, for example, focuses on accounts of historical figures, events, explanations and causes of events, societies, and chronology. In addition, substantive structures and syntactic structures of history cannot be ignored because this information, topics, and ideas are subject to disagreements and different interpretations based on various perspectives (Ball & McDiarmid, 1990). Content knowledge does not exist independently from these structures (Grossman, Wilson, & Shulman, 1989; Wilson, 1988).

There are various substantive structures in a discipline (Schwab, 1978). For instance, historians frame their inquiry through varied lenses, including those of economics, gender, ethnicity, and politics. Wilson (1988) reminded us that substantive structures of history could be explained as various “ways of seeing,” a phrase borrowed from Tyack (1976), and in a study concerning teachers’ understandings of substantive structures of history, Wilson (1988) found that history teachers observed history through different lenses. For instance, a history teacher who majored in political science primarily knew things about topics that were related to economics and politics and saw history as a study of those subjects.

Besides knowledge of substantive structures, history teachers need to understand syntactic structures as well, which include the methods that are used to bring new





knowledge into a discipline. Part of our syntactic knowledge of history involves the role of interpretation.

The fourth component of subject matter knowledge of history is teachers' beliefs about history. In Wilson's study (1988), for instance, one history teacher believed that history was equivalent to factual information and that it had little bearing on or relevance to students' lives. Evans (1989) found that history teachers had various conceptions of history and, accordingly, developed various approaches to the teaching of history. For instance, one history teacher described history as "soap opera" (Evans, 1989, p. 218). She told stories in her history classes and emphasized details about particular people and events. This teacher mostly lectured (Evans, 1989). Thus, researchers claim that the role of subject matter knowledge in teaching is significant not only insofar as it influences what is to be taught but also the selection of instructional activities (Ball & McDiarmid, 1990; Wilson, Shulman, & Richert, 1987; Wineburg & Wilson, 1991).

Clearly, content knowledge is important to teaching. For instance, American history teachers need to know about the American Revolution and about the chronology of historical events during the Civil War. Teachers who lack such rely heavily on textbooks, staying only a few pages ahead of students and choosing to lecture rather than raising questions and inviting students to discuss them (Grossman et al., 1989). Obviously, it is impossible for teachers who lack content knowledge in a given subject matter to critique the text's accuracy (Wilson, 1988). Ball and McDiarmid (1990) also noted that: "When teachers possess inaccurate information or conceive of knowledge in narrow ways, they may pass on these ideas to their students. They may fail to challenge students misconceptions; they may use texts uncritically or alter them inappropriately"

(p. 438).

One of my hypotheses is that teachers' political orientations and national identities shape how they respond to current curricular reform in social studies in Taiwan.

However, I am also interested in the role played by other factors, including teachers' knowledge and beliefs about teaching and learning history. In the next section, I describe the subject matter knowledge of my three informants, beginning with their subject matter knowledge of Taiwan history.

### **Teachers' Subject Matter Knowledge of Taiwan History**

I focus on two dimensions of subject matter knowledge possessed by each participant: content knowledge *of* Taiwan history and knowledge *about* Taiwan history. Through my investigation of participants' understanding of Taiwan history, I hope to answer the following questions: What is each participant's understanding of Taiwan history? What does each participant know about the role of interpretation in history?

#### **Knowing the Content of Taiwan History**

The data I drew on to sketch the participants' understanding of history were mainly collected from a topic identification interview with each participant (see the methodological appendix for a description of this task). In addition, I also drew on data from field notes and other interviews. In this section, I explore teachers' understandings of Taiwan history based on the quantity of topics that each participant could (and could not) identify correctly. This assessment serves as a window through which we can examine each participant's knowledge of Taiwan history, including events and political figures. First, I report on the procedure I used for evaluating each informant's responses. Then I report my findings.

To elicit their knowledge, I asked each participant about 80 topics, which were selected from texts on Taiwan history. I sorted their responses into three categories: topic identified correctly, topic identified vaguely, and unknown.<sup>25</sup> In order to maintain a relatively objective standard in the process of evaluation, I constructed a prototype of significant information concerning each topic. This prototype served as a reference to help me decide how to sort responses. My judgments were based on a comparison of the amount of information listed in the prototype and the participant's response. If the participant recognized more than half of the information on the given topic, this was evaluated as "identified correctly." If the participant recognized less half of the information listed or less, the account was categorized as "identified vaguely." If the participant did not respond or if the account was completely wrong, it was put into the category "unknown." I provide several instances to illustrate the process.

The categorization process was determined by the *content* of accounts rather than the length of an account. With some topics, the teachers responded that they did not know about the topic, while with others they had short answers of one or two sentences that were often circular and/or vague. For instance, Ms. Hu responded to the topic *hsieh-tou* (communal strife) as "people fighting each other." This account was evaluated as "unknown." Ms. Hu did not specifically identify information that was essential to learning about this topic: Why had the social violence taken place? Who was involved? Drawing on texts concerning Taiwan history, I summarized the topic *hsieh-tou* in my prototype as follows:<sup>26</sup>

---

<sup>25</sup> I adopted these categories from Wilson (1988).

<sup>26</sup> This is a summary based on Hsu (1980) and Weng (1991).

During Ching's administration over Taiwan, there were at least 77 instances of communal strife. Strife between the southern Fukienese and the Hakka had the highest incidence rate. The outbreaks of fighting also occurred between the people of *chang-chou* and *chuan-chou* (both were southern Fukienese). These two types of communal strife between regional groups accounted for more than half of the total. The scale of the fighting was much greater than with the other types, such as the feuds between different surname groups and fighting among groups with the same surname. Historians have explained the causes of the communal strife differently. Economically, the three regional groups -- Hakka and two groups of southern Fukienese -- competed for lands and irrigation water. Socially, various organizations, including secret societies, geographical groups, and groups made up of people who shared a common surname and a common ancestral home, contributed to the frequency and scale of communal strife. More broadly speaking, Taiwan's frontier situation, characterized by an armed population, unbalanced sex ratios, ineffective political control, weak lineage organizations, and voluntary associations, all contributed to the occurrence of this social violence.

Longer answers were not necessarily more correct. For instance, Ms. Hu responded to the topic of the 2/28 incident with a longer account than the other two teachers, but she did not provide much correct information. Thus, I evaluated her explanation of the 2/28 incident as "unknown." The following is the summary of Ms. Hu's understanding of this event (I highlight her mistakes).<sup>27</sup>

It took place between 1949 and 1951. The incident was caused by a conflict between mainlanders and Taiwanese. The reasons for this conflict involved social and political cleavages between mainlanders and Taiwanese at the time. During Japanese colonial rule, although the Taiwanese were oppressed by the Japanese, some Taiwanese did not hate the Japanese. However, when mainlanders came to Taiwan in 1949, the Taiwanese did not regard them as *turng-bau* (fellow countrymen). The Taiwanese did not like mainlanders; they regarded them as outsiders who had invaded their homeland. I guess that is because the Taiwanese did not understand the Mandarin spoken by the mainlanders and because the appearance of mainland troops -- arriving in Taiwan for the first time -- looked like beggars, dressed in rags and out of control. On the basis of this impression of mainlanders, the Taiwanese intentionally proceeded to alienate them.

---

<sup>27</sup> This is a summary of Ms. Hu's accounts provided in both the topic identification interview and accounts she provided in other interviews. To make the accounts concise, this is a summary rather than a verbatim quotation.

But the most important cause for reinforcing this hostility toward mainlanders had something to do with the distribution of political power between Taiwanese and mainlanders. Our government and mainlanders retreated to Taiwan. Therefore, the Taiwan provincial government and local governments were filled with mainlanders. There was no positions left for Taiwanese. In my view, the policy was not wrong because the Taiwanese were not as well-educated as the mainlanders due to Japanese rule. Surely, the Taiwanese were not qualified to be public servants.

Confronted with the hostility of the Taiwanese, mainlanders looked down upon the Taiwanese because most of them were illiterate and poorly educated.

Conspirators and local ruffians took advantage of the hostility between Taiwanese and mainlanders and they started the riot. To keep society stable, the government cracked down on them. Inevitably, during the crackdown on rioters, innocent and ordinary people were unintentionally hurt.

I approve of the government's actions because the riot took place at a critical time. It was the time that government had retreated from the mainland to Taiwan and the most important thing at the time was to guard Taiwan from the Chinese Communist military attacks. Therefore, it was reasonable for the government to crack down so that we could keep the social order stable. Without doing so, Taiwan could not have been safe from the threats of the Chinese Communist Party.

According to the prototype, the criteria for evaluating the informants' responses included information about dates, causes, the events that made up the incident, and its consequences. With respect to the causes of the incident, I heard various interpretations. The incident has long represented a controversial issue subject to various interpretations offered by different ideological camps. For instance, the KMT indicated that the causes of the incident were rooted in the evil of Japanese education, a conspiracy of the Chinese Communist Party, and the wild ambition of Taiwanese schemers (Chen, 1991). The United State's Chinese White Paper suggested that the causes of the incident were due to Chen Yi's misrule. Obviously, this interpretation has been denied by the KMT (Mendel, 1970). Besides these interpretations, a recent interpretation suggests that KMT misrule

was *a* cause of this incident, not *the* cause of this incident (Lai et al., 1991, p. 6). By placing the incident in the historical context of Taiwan and China in the 1940s, Lai and his colleagues (1991) have interpreted the incident as a “tragedy” and they emphasize that it was caused by the gap between Taiwanese people’s high expectations concerning the motherland and the reality of the Chinese state at the time. Although the causes of the 2/28 incident are controversial, Chen Yi’s misrule was clearly a major factor. If answers provided by the informants missed this point and merely provided other answers, this was not assessed as a correct answer.

What Ms Hu knows about the 2/28 incident mostly comes from her father.<sup>28</sup> Her account is deeply flawed. First, the incident took place in 1947, two years before the retreat of the KMT government to Taiwan. However, Ms. Hu believes that the incident took place after 1949 (after the KMT government’s retreat to Taiwan). She then justifies the government’s actions on the basis of military threats from the PRC (which was established in 1949, two years after the 2-28 calamity). Second, the incident was not caused by conflict between mainlanders and Taiwanese; rather, Taiwanese hostility towards mainlanders was a consequence of the event (Edmondson, 1996; Mendel, 1970; Kerr, 1965; Wachman, 1994). Third, the incident itself was not simply a “riot”; it was a massacre during which Chinese soldiers shot down many Taiwanese, secretly killing Taiwanese elites who had requested political reforms under Chen Yi’s military

---

<sup>28</sup> She volunteered that her father had told her about the incident. She knows that there are alternative explanations (i. e., her grandfather on her mother’s side had a different account from that of her father). However, she considers her father’s explanation to be more credible because she trusts her father more than others. In addition, she believes that the event has been intentionally used by independence advocates to attack the KMT government. Therefore, she sees those accounts as politically biased.





administration (Lai et. al., 1991; Mendel, 1970; Kerr, 1965; Peng, 1972; Wachman, 1994). Moreover, among causes identified by Ms. Hu, none referred to Chen Yi's misrule. Yet a report on this event, submitted by General Wedemeyer to the U. S.

Department of State on August 17, 1947, indicated:

The people (Taiwanese people) sincerely and enthusiastically anticipated deliverance from the Japanese yoke. However, Chen Yi and his henchmen ruthlessly, corruptly, and avariciously imposed their regime upon a happy and amenable population. The (Chinese) Army conducted themselves as conquerors. Secret police operated freely to intimidate and to facilitate exploitation by central government officials. (Medel, 1970, p. 41)

However, the KMT's official view of this event blamed the Chinese Communist Party for triggering the incident. A report submitted by the Minister of Defense of the KMT government in Nanking at the time of the incident explained:

Background causes: The Taiwanese people had received a sordid, evil education from the Japanese, and had been misled by depraved propagandists. Proximate causes: The Communist Party and ambitious schemers had used the case of an arrested smuggler to launch their uprising. (Lai et al., 1991, p. 5).

Apparently, Ms. Hu's understanding of the 2/28 incident primarily adopts the KMT's interpretation. For instance, she identified "conspirators and local ruffians" as major players responsible for triggering the incident. In addition, she justified the KMT's crackdown on the basis of the PRC's threat and with the need to keep society stable in the face of the threat of the PRC.

Ms Chen's knowledge of the 2/28 incident was vague. Her account was shorter than Ms. Hu's, partly correct and partly wrong (I highlight vague or incorrect comments):

It was a conflict between Taiwanese and Chen Yi's armed forces in 1947. The KMT government recovered Taiwan in 1945 and appointed Chen Yi as Taiwan's governor. Because the rule of Chen Yi was like that of earlier Japanese colonial rulers, the Taiwanese did not like mainlanders and did not welcome them to Taiwan. Also, Mainlanders did not like the Taiwanese. This caused the incident

to happen. (Chen, I #5, 2/15/98)

In Ms. Chen's account, the year of the incident is correct, as is her reference to Chen Yi's colonial rule over Taiwan as a trigger. However, she too believes that the incident resulted from hostility between Taiwanese and mainlanders and she simplifies the incident as "a conflict between Taiwanese and Chen Yi's armed force."

In contrast, Mr. Lin's accounts of the incident was correct:

It happened in 1947. It was a massacre in which many Taiwanese were killed. There were two major causes: (1) cultural differences between Taiwanese and Chinese rulers at that time and (2) Chen-Yi's administration treated Taiwan as a colony of China and ruled the Taiwanese in the same way as the Japanese colonial rulers had done. This incident had a significant impact on Taiwanese life afterwards. The incident symbolized Taiwan's miserable fate of being oppressed by foreign rulers. In addition, the most important effect was that the incident helped the formation of Taiwanese consciousness. Afterwards, the hostility of the Taiwanese towards mainlanders was related to this incident. (Lin, I # 4, 1/19/98)

Mr. Lin's account is not comprehensive because he did not provide all the related details concerning the incident. However, he identified correctly the year and the impact on Taiwanese society that followed; he provided more than 50% of the information in my prototype.

Not all of Mr. Lin's responses were easily evaluated. Some responses were partly wrong and partly correct. For example, in response to the topic of Kodama Gentaro, a Japanese governor during the period of colonial rule, Mr. Lin explained: "He was one of Taiwan's governors during Japanese colonial rule. Every governor devoted himself to managing Taiwan. Their power was limited to the field of administration. They did not intervene in the jurisdiction of military matters" (Lin, I # 4, 1/19/98). I evaluated Mr. Lin's understanding of this topic as "unidentified." Although he was able to recognize Kodama Gentaro as one of Taiwan's governors under Japanese colonial rule, he did not

understand the political structure of Japanese colonial rule in Taiwan or that the governor had ultimate power over administration, jurisdiction, and military matters. His misunderstanding suggests that he does not really know much about the political role of the governor, who represented the critical figure under Japanese colonial rule. In addition, he did not provide any additional information about Kodama Gentaro or his administration over Taiwan.

The following is my prototype for this topic.<sup>29</sup>

Kodama Gentaro was appointed as Taiwan's governor from 1898 to 1906. Before he came to Taiwan, he had been the Army vice-minister in Tokyo and one of the members of that talented generation of young leaders who carried out the Meiji reform. With a plan to build Taiwan into Japan's southern industrial frontier, Kodama and his chief executive officer, Dr. Goto, devoted themselves to setting Taiwan on the road to an unprecedented prosperity. His administration initiated the development of agriculture, irrigation, railroad system, telephone, postal systems, hospitals, schools, banks, and local hygiene agencies. Unlike the previous three governors, Kodama focused on schooling and raising the Taiwanese standard of living as a way to eliminate Taiwanese armed resistance.

On this topic, Ms. Chen declared that:

He (Kodama Gentaro) pretended that he wanted to release Lin Shauh-mau from prison to win Lin's trust. However, at last, Kodama Gentaro killed Lin Shauh-mau. Lin was a hero, who led a group of Taiwanese nationalists in resisting Japanese rule, but he did not succeed. (Chen, I # 5, 2/5/98)

Ms. Chen's account is very limited, fragmented, and inconsistent. She describes a relationship between the governor and Lin Shauh-mau, but she does not indicate that Kodama Gentaro was governor. The rest of her account shifts to Lin Shauh-mau. I evaluated her response as unidentified. In Ms. Hu's response to this topic, she directly told me that she did not know anything.

Clearly, the three informants understand Taiwan history differently. In general,



Mr. Lin recalled more information than either Ms. Chen or Ms. Hu. Of the 80 topics, Ms. Chen identified 21 of them correctly, 19 vaguely, and knew nothing about the other 40 topics. Ms. Hu identified 16 correctly, 23 vaguely, and knew nothing about the remaining 41. Mr. Lin identified 58 correctly, 12 vaguely, and knew nothing about 10.

Table 1. Topic Identification: Cross-case Comparison

Name	Identified correctly	Identified vaguely	Unknown
Ms. Chen	21(26%)	19 (24%)	40 (50%)
Ms. Hu	16 (20%)	23 (29%)	41 (51%)
Mr. Lin	58 (72.5%)	12 (15%)	10 (12.5%)

We need to go beyond quantitative measures, however, and seek the significant meanings that lie beneath these numbers to describe the qualities of the teachers' substantive subject matter knowledge. To dig deeper, I divided the topics into two categories: one category contains 15 topics which were derived from the textbook that is currently used in elementary schools and another category contains 65 topics which were selected from other texts. Among the 15 topics selected from the textbook, Ms. Hu identified 11 topics correctly and 4 topics vaguely; Ms. Chen identified 13 topics correctly and 2 topics vaguely. Mr. Lin identified all 15 topics correctly. This suggests that all teachers know more about the topics in the textbook.

Table 2. Topic Identification To 15 Topics In the Textbook

Name	Identified correctly	Identified vaguely	Unknown
Ms. Chen	13 (87%)	2 (13%)	0
Ms. Hu	11 (73%)	4 (27%)	0
Mr. Lin	15 (100%)	0	0

---

<sup>29</sup> This information about Kodama is based on Kerr (1974) and Tsurumi (1977).

With the remaining 65 topics not included in the textbook, there is a great deal of variation among the participants: Ms. Chen knew 14 topics, was vague about 10 topics, and knew nothing about 41. Ms. Hu knew 11 topics, was vague about 11, and knew nothing about the remaining 43. By contrast, Mr. Lin identified 43 correctly, 12 vaguely, while 10 were unknown to him. It would appear that Ms. Hu's and Ms. Chen's substantive knowledge is closely related to knowledge commonly disseminated in the school system while Mr. Lin appears knowledgeable concerning topics that are not included in the official national curriculum as represented by the textbook.

Table 3. Topic Identification To 65 Topics Not Included In the Textbook

Name	Identified correctly	Identified vaguely	Unknown
Ms. Chen	14 (21%)	10 (16%)	41(63%)
Ms. Hu	11 (17%)	11 (17%)	43 (66%)
Mr. Lin	43 (67 %)	12 (18 %)	10 (15 %)

A closer examination of the topics not represented in the textbook reveals other patterns. Neither Ms. Chen nor Ms. Hu is familiar with the topics pertaining to Taiwanese aboriginal tribes (their origins, interactions with Chinese settlers, etc.) or the development of Taiwan during Japanese rule (social movements, Taiwanese political elites, and the Japanese industrialization of Taiwan). In addition, neither Ms. Chen nor Ms. Hu demonstrate much knowledge of the KMT's administration from 1945 to the 1980s, in particular, its authoritarian politics.

Usually, textbooks do not provide much information pertaining to aboriginal tribes. If Ms. Chen and Ms. Hu know only the textbook, it is not surprising that they know little about these topics. In the next section, I briefly introduce Taiwanese

aborigines. Then I present the three teachers' understanding of two topics pertaining to Taiwanese aborigines.

Taiwanese aboriginal tribes are related to aborigines in the Philippines, Indonesia, and Malaysia and they speak Malayo-Polynesian tongues. Based on their general areas of habitation, Taiwanese aboriginal tribes can be divided into two groups: *Pin-po* tribes (the lowland aborigines (*Pin-po* means plains in both Taiwanese and Hakka) and *Gau-shang* tribes (mountain aborigines). Because the *Pin-po* tribes had an earlier exposure to external contacts with the Dutch and Chinese settlers, Ching officials called them *shour-fan* (ripened or civilized aboriginal tribes) and called the mountain aborigines, who rarely had contact with the invaders *sheeng-fan* (raw or non-civilized aborigines).

The *Pin-po* tribes can be divided into 10 to 14 groups based on ethnographic traits and geographical distribution. They mostly inhabited areas on Taiwan's western plains and in the northeast. During the Dutch era, both the Dutch and the Chinese advanced into the southwestern area and changed aboriginal ways of life. For instance, the Dutch increased the aborigines' dependence on trade, imposed taxes on them, and introduced schools and churches. During the Cheng kingdom, surging tides of Chinese immigration arrived in Taiwan in the early 1660s, spreading out rapidly in the southwestern plain and invading areas of aboriginal habitation. The *Pin-po* tribes started to migrate. One group belonging to the Siraya tribe, who originally had lived in what is today Tai-nan, was forced to migrate to eastern and southern Taiwan. During the Ching dynasty administration, Chinese settlement expanded. Consequently, *Pin-po* tribes were forced to continuously migrate, eastward to the hills and mountains and even further, migrating across the central mountain range to eastern Taiwan.





Nevertheless, many of the *Pin-po* tribes did not migrate and they had many opportunities to live with Chinese settlers. Initially, Chinese settlers rented farming lands from *Pin-po* landlords and paid them, primarily in agriculture products, or *fan-tsu* (aboriginal rent). *Pin-po* tribes adopted the land system of Chinese Han society because *Pin-po* society did not have any fixed concept of the privatization of lands. Eventually, *Pin-po* landlords lost their lands to Chinese settlers. There were several reasons for this change: *Pin-po* aborigines were taxed at a high rate and once they could no longer afford it, they sold their lands to Chinese settlers. Even worse, some cases involved trickery and violence. In some cases, Chinese tenants owing *fan-tsu* to *Pin-po* landlords simply occupied the land. Other cases involved marriages between Chinese settlers and *Pin-po* women. Because *Pin-po* tribes were a matriarchal society where daughters inherited the family property after the death of the parents, the descendants of the mixed marriages acquired *Pin-po* land (Chou, 1998). Eventually, *Pin-po* tribes became assimilated into Chinese society.

Taiwanese mountain aboriginal tribes consist of 9 to 10 culturally distinct groups. They mainly inhabited the mountainous central and eastern regions of Taiwan. During Ching rule, due to the increasing number of Chinese settlers, Chinese settlements expanded and invaded these aboriginal lands. The mountain aborigines killed the invaders. In order to reduce the level of conflict and protect Chinese settlers, in the 1730s the Ching government established a boundary between the lowland and the mountain regions to prevent Chinese settlers from invading aboriginal areas. The decree was not overturned until 1875. However, throughout this period of time, some Chinese settlers violated the order and invaded the territory of the mountain aborigines and fought with

the aborigines, who resisted the invasions. Chinese settlers often won the wars and mountain aborigines lost their lands that bordered the lowlands, retreating deeper into the mountains.

By the close of two centuries of Chinese rule from 1662 to 1895, most of the *Pin-po* tribes had been assimilated. Those who migrated to the hills or to eastern Taiwan were able to maintain some of their cultural heritage. However, eventually, all the *Pin-po* tribes disappeared and no longer exist in today's Taiwan. We have little information concerning the languages and culture that they possessed. Living in isolated mountain regions, the mountain aborigines managed to preserve their living space and their culture.

Both Ms. Hu and Ms. Chen's understanding of Taiwanese aboriginal tribes is scant; this is especially true of the *Pin-po* tribes and their interactions with Chinese settlers. Ms. Hu explained that: "They had lived in western Taiwan. After the Han people emigrated from the mainland, the *Pin-po* tribes were assimilated into the Chinese Han people" (Hu, I # 5, 1/22/98). When I asked her about the expression *shour-fan* (*shour* means "cooked," connoting being civilized; *fan* means barbarians), Ms. Hu did not know that *shour-fan* was a term used to refer to the *Pin-po* tribes. Ms. Chen could distinguish the *shour-fan* from the *sheeng-fan*, but her knowledge about the *Pin-po* tribes was also scant. She knows only that a *Pin-po* tribe had previously lived in the Taipei basin: "*Pin-po* tribes were the earliest residents of Taipei. They inhabited *Guan-du* Plain. They were assimilated into the Han people" (Chen, I # 5, 2/15/98).

When asked about the meaning of *fan-tsu* (aboriginal rent), neither Ms. Hu nor Ms. Chen identified it correctly. According to Ms. Hu: "The aborigines rented farm land from the Ching government" (Hu, I # 6, 2/3/98). According to Ms. Chen: "This referred

to a tax that aborigines paid to the Japanese, such as a hunting tax” (Chen, I # 5, 2/15/98).

Mr. Lin’s understanding of Taiwanese aboriginal tribes appeared richer than that of either Ms. Chen or Ms. Hu. Mr. Lin explained that:

The *Pin-po* tribes consisted of ten different tribes with different cultures and languages. All were closely related to Malayo-Polynesian aborigines. They came to Taiwan later than the ancestors of current Taiwanese aboriginal tribes. They inhabited Taiwan’s western plains. For instance, the Ketagalan tribe lived in the area of today’s Taipei and the Siraya tribe lived in what is today Tainan. During the Ching dynasty, Chinese settlers emigrated to Taiwan in surges and afterwards *Pin-po* tribes were assimilated with Chinese settlers. Some Chinese settlers married *Pin-po* women. Thus, *Pin-po* tribes are part of Taiwanese people’s ancestors. (Lin, I # 4, 1/19/98)

With respect to the topic of *fan-tsu*, Mr. Lin explained:

Initially, Chinese settlers who came to this island with nothing did not own lands. They negotiated with *Pin-po* tribes and rented their lands. Chinese settlers paid a single payment or periodic rent to *Pin-po* landlords, which was called *fan-tsu*. (Lin, I # 4, 1/19/98)

Ms. Hu and Ms. Chen also have only limited awareness of the social movements that occurred under Japanese rule. I also asked the participants about topics pertaining to Taiwanese politicians and their efforts to improve Taiwan’s democracy.<sup>30</sup> Neither Ms. Hu nor Ms. Chen knew much about these topics. Asked about the Taiwanese Cultural Association, Ms. Hu said: “It probably is an association that was created in recent times, made up of people who are interested in studying Taiwan history” (Hu, I # 6, 2/3/98). Ms. Chen’s understanding of the Taiwanese Cultural Association was vague: “Under Japanese rule, a group of people who loved Taiwanese culture established the Association” (Chen, I # 5, 2/5/98).

---

<sup>30</sup> This topic is not included in the account of Taiwan history taught in the school.

My prototype for the Taiwanese Cultural Association read:

It was established in 1921. Its members consisted of farmers, laborers, students, physicians, lawyers, business owners, intellectuals, and Taiwanese political elites. The purposes of the Association were to preserve Chinese culture identity and to call for the creation of a local parliament with elective representation in the National Diet at Tokyo (Kerr, 1974). The Association established local branches island-wide, printed newspapers, assisted with the establishment of farmer's unions, held conducted public lectures. Due to disagreements among its members concerning political ideologies, the Association ended in 1927. Taking the form of a peaceful resistance movement, the Association had significant impact in terms of raising the level of cultural consciousness among the public and forming Taiwanese determination to resist Japanese colonial rule. (Lin, 1993; Tsurumi, 1977)

Mr. Lin did not have to invent a definition:

After 1915, Taiwanese resistance movements against Japanese rulers started to change. The new generation that had received a Japanese education realized that all armed resistance movements aimed at overthrowing Japanese colonial rule would be in vain. Some educated Taiwanese elites believed that forming cultural movements might be more helpful in resisting Japanese colonial rule. A new generation of Taiwanese elites who studied in Japan and then came back to Taiwan led the movement. The Taiwanese Cultural Association, which was established at the beginning of the 1920s, was the most influential group at that time. The Association delivered speeches, initiated local farmers' associations, and established a newspaper and the Popular Party. Its purpose was to cultivate a Taiwanese consciousness among Taiwanese people, to consolidate and unify the Taiwanese, and to demand political autonomy. The Cultural Association was a part of the famous Home Rule Movement. However, the Association did not achieve its purpose and was disbanded. One of the causes of the end of the Association was that its members had become divided into different ideological camps, such as communism and capitalism. (Lin, I # 4, 1/19/98)

The pattern repeats itself with respect to the history of the KMT administration.

Ms. Chen and Ms. Hu do not know much about the KMT's administration over the past four decades, including issues related to martial law and suppression of freedoms. Ms. Hu told me that she thought that such topics should be taught in civics classes rather than in history classes and generally speaking, students learn about the KMT's administration in civic education classes. Topics pertaining to the KMT's administration focus on its



contribution to Taiwan.

When responding to the topic of martial law, Ms. Chen was mistaken about when martial law was implemented and she did not appear to understand the law itself. She explained that martial law was implemented by Chen Yi after the 2/28 incident. And what Chen yi had announced martial law during the crackdown on the riot. The martial law I had asked about during the topic identification interview was the one that had been implemented from 1949 to July 15, 1987. However, Ms. Chen simply discussed Chen Yi's martial law: "Martial law was implemented soon after the 2/28 incident to keep society stable. The law imposed curfews and restricted the freedom of speech" (Chen, I # 5, 2/15/98). It is not clear why Ms. Chen made this mistake. It could be that she did not consider *the* martial law that was maintained over four decades to be one of the important issues in recent Taiwan history, or that she does not know about that martial law.

But anyone who wants to understand Taiwan's past cannot ignore the topic of martial law for it has been extremely significant as a political watershed (Chao & Myers, 1998; Wachman, 1994). Political scientists have noted that martial law made the ROC regime an authoritarian regime and the lifting of martial law brought Taiwan into democratization (Chao & Myers, 1998; Cheng, 1989; Chou & Nathan, 1987; Lu, 1991; Wachman, 1994). Much of the effort of the opposition in the 1980s was devoted to demanding that martial law be lifted so that Taiwan could become a democracy (Wachman, 1994).

The KMT's official view of martial law was positive, claiming that martial law served to outline "security measures for protecting the island" (Chao & Myers, 1998, p. 2). Responding to the criticism calling for the lifting of martial law in the 1980s, the

KMT argued that “martial law must remain in place as long as the Communist-dominated polity on the mainland exists. That polity threatens Taiwan, and, therefore, only martial law can protect the island’s people from communist subversion” (Chao & Myers, 1998, p. 79). When Chiang Ching-kuo announced the end of martial law, he claimed that “martial law actually helped us to achieve our successes” (Chao & Myers, 1998, p. 149). It is clear that the implementation of martial law, according to KMT rhetoric, was to protect Taiwan from attack by the PRC. The gruesome reality behind the rhetoric is that martial law not only imposed curfews and restricted freedoms of speech, but the Taiwan Garrison Command, Security Bureau, police, and military courts arrested, tried, imprisoned, and sometimes executed individuals who intended to form an opposition party or deliver speeches criticizing the KMT’s policies and the regime’s legitimacy (Chao & Myers, 1998; Cohen, 1988;).

Ms. Hu’s understanding of this topic was also vague. She was aware of when martial law was implemented but she described the effects of the law merely as restrictions on the freedom of speech and the right to form political parties. Ms. Hu believes that martial law was good for Taiwan because the law protected Taiwan from the threats of the PRC. She also believes that the implementation of martial law served to reduce tensions between mainlanders and Taiwanese, and kept society in harmonious:

After we (the ROC) retreated to Taiwan, the government implemented martial law to prohibit people from forming political parties, organizing agencies, and publishing newspapers. For many years, we faced external threats from the Chinese Communists as well as from within our own society. There was tension between mainlanders and Taiwanese, therefore, we implemented martial law. I believe that under those circumstances, it was necessary to implement martial law. (Hu, I # 5, 1/22/98)

Mr. Lin explained several key points concerning martial law, when it was

implemented, the government's rhetoric, its purpose, and impact:

After the KMT government retreated to Taiwan in 1949, the government exercised its power to limit people's liberties and civil rights. At the time, the government emphasized the importance of maintaining social stability by enforcing the law. A variety of institutions were responsible for implementing the law. With martial law, the judicial process was frozen. Freedoms and civil rights such as freedoms of speech, the formation of new political parties, the right to march and demonstrate, strikes, and freedom of assembly and association were also frozen. The consequence of the law was that Taiwan remained under authoritarian rule for four decades. (Lin, I # 4, 1/19/98)

In addition to martial law, I asked the three teachers about the Temporary Provisions, another highly significant legal action of the ROC government. The National Assembly set up the Provisions in May 1948 as an amendment in accordance with article 174 of the 1946 Constitution. The purpose of the Provisions was to provide the president with unlimited power to deal with emergencies faced by the government during the civil war in China. After the KMT's retreat to Taiwan, the Provisions remained in effect until 1991. There were 11 articles, including:

Article 1 empowered the president to take whatever emergency measures may be necessary to cope with an imminent danger to the security of the nation or any serious financial or economic crisis.

Article 3 stated that "During the period of communist rebellion, the president and vice presidents may be re-elected without being subject to the two-term restriction prescribed in Article 47 of the constitution."

Articles 6 and 7 authorized the president to set up an *ad hoc* organization to determine major policies concerning national mobilization and suppression of rebellion. For instance, the president may promulgate regulations governing the election of additional representatives to the central parliamentary bodies without being subject to the restrictions of the constitution.

Article 10 entrusted the president with full authority to decide if and when the period of Chinese communist rebellion is over.

Article 11 conferred on the National Assembly the right to amend or to abrogate the Temporary Provisions. (The 1988 Yearbook of the Republic of China, p. 117).

Thus, the president was given unlimited power to authorize policies deemed



necessary to deal with threats to national security, natural disasters, and economic catastrophes and, with the approval of the Assembly, the power to abolish the Provisions. In addition, the president could be re-elected without being subject to the restriction of a two-term presidency. These Provisions had a major impact on Taiwan's politics for 40 years.

There is no doubt that the Provisions provided enormous power to the president. Moreover, they enabled the KMT to control the polity and completely dominate society, melding the party and the state into one machine, thus making for single-party authoritarian rule since the KMT's chairman was also the president (Chao & Myers, 1998; Wachman, 1994).

Ms. Chen did not understand the Provisions. She guessed the time when they were promulgated as 1949 and that the purpose of the law was to successfully manage Taiwan: "I do not know much about the law. I guess that the Provisions were initiated in 1949 when our government retreated to Taiwan. The purpose of implementing the provisions was to make the administration of Taiwan a success" (Chen, I # 5, 2/15/98). Ms. Hu also guessed: "I do not know much about the Provisions. I guess that they were designed to compensate for the insufficiency of the Constitution. (Hu, I # 5, 1/22/98). Mr. Lin, however, was much more informed.

The Provisions were initiated in the last year of the KMT's administration over China to increase the power of the president during the civil war. However, soon after issuing the Provisions, the KMT government was defeated by the Communist Party and then retreated to Taiwan. After that, the Provisions took effect in Taiwan. Over the past four decades, the regulations set by the Constitution concerning the terms of the presidency and the scope of the president's power over the administration of Taiwan were suspended. For instance, due to the Provisions, Chiang Kai-shek and his son could retain the presidency until their deaths. In addition, the president could exercise his power without restrictions from the parliament. With the provisions, between 1949 and

1991, the ROC was an authoritarian regime with two presidents Chiang, who completely controlled the state like two emperors. (Lin, I # 4, 1/19/98)

In sum, the three teachers understand Taiwan history quite differently. Ms. Chen and Ms. Hu, who both espouse a Chinese identity, understand much less than Mr. Lin, a Taiwanese nationalist. Ms. Chen and Ms. Hu's understanding of Taiwan's history also appears to be closely related to what is in the textbook. Recall that these books were commissioned by the government and designed to cultivate a Chinese identity in students. By contrast, Mr. Lin knows about both the textbook topics and other important events and people that are not part of the national school knowledge.

In addition to substantive knowledge of Taiwan history, I was also interested in the teachers' syntactic knowledge, in particular, their views on the interpretative nature of historical knowledge.

### **Understanding the Interpretative Nature of Taiwan's History**

I asked three questions to elicit the teachers' understanding of the interpretative nature of history: (1) What is history? (2) What do historians do when they study history? (3) Is there a version of Taiwan history with a Taiwanese-centered perspective?

#### **What Is History?**

To laypeople, the term "history" often means "the past.". One American radio commentator, for example, said that "history is very simple. History is what happened, and history ought to be nothing more than the quest to find out what happened" (Nash, Crabtree, & Dunn, 1998, p. 6). But to historians, history includes both knowledge of the past and the creation of arguments that explain that past. As Hexter (1971) explained, history can be "any patterned, coherent account intended to be true of any past happenings

involving human intention” (p. 5). Jenkins (1991) has argued that “history is a shifting discourse constructed by historians and that from the existence of the past no one reading is entailed: change the gaze, shift the perspective, and new readings appear” (p. 13).

Historians also distinguish between the past and historical records of the past. The past was a series of events and it can only be brought back by historians through different records. Finding out what happened always involves indirect methods (e.g., using primary documents and artifacts) and the historians’ work of selecting and interpreting historical materials. Carr (1964) explains the historians’ work as “processing process”: “The facts, whether found in documents or not, have still to be processed by the historian before he can make any use of them: the use he makes of them is, if I may put it that way, the processing process” (p. 16). Carr and other historians suggest that history is not “the past” per se; rather, history is a record of the past written by historians, through an examination of evidence and the construction of interpretations.

Some educational scholars claim that students need to learn about both factual knowledge and the interpretative nature of history. For instance, Levstik and Barton (1996 b) have documented how history teaching in elementary and middle schools can be conducted to engage students in “doing” history; that is, students were encouraged to “frame questions, gather data from primary and secondary resources, organize and interpret that data, and share their work with different audiences” (p. xi). Through doing history, students are expected to gain not only factual knowledge of history but also to learn history as interpretation. Holt (1990), who writes about his university teaching, speaks of history as: “It is go beyond facts toward the making of a narrative” (p. xi) and “An ongoing conversation and debate rather than dry facts and dates, a closed catechism,

or a set of questions already answered” (p. 13). He believes that learning history is not memorizing “someone else’s facts” (p. 3); rather, he insists that teaching history needs to engage students in the doing of history, using primary resources and constructing interpretations, so as to cultivate students’ historical thinking -- imagining and questioning. In addition, he also wants students to read texts and to remember that the texts were created and shaped by human minds (Holt, 1990).

As I see it, the most serious weakness in the discussion of Taiwan’s history is the refusal of many to admit that history is interpretative. In order to investigate whether participants had an understanding of the interpretative nature of history, I asked each participant a question: What is history?

Ms. Hu defined history exclusively as “the past, what happened in the time prior to the present time” (Hu, I # 4, 1/20/98). When I probed her as to what school history was, she went continued: “History taught in schools is about a timeline on which events that happened in the past from ancient times to the present are placed chronologically” (Hu, I # 4, 1/22/98). From Ms. Hu’s point of view, history is synonymous with the past and teaching history to students means teaching them about what happened in the past. With the notion that history is simply “what has happened in the past,” Ms. Hu fails to distinguish the “human past” from “coherent statements about the human past.”

Failing to distinguish the past from the record of the past, Ms. Hu believes that history -- the past -- consists of objective facts. Using the 2/28 incident as an example, Ms. Hu explains what historical facts mean to her:

Everything that happened in the past is historical fact. Therefore, history tells us about the past -- the past has already happened -- therefore, history is about facts. For instance, we can not deny the 2/28 incident as a historical fact because it



really happened on February 28. It is impossible for us to change the fact that the incident happened on February 28. And this is history; no one can change it because the incident really happened. (Hu, I # 2, 9/13/98)

Ms. Hu considers everything that happened in the past as historical fact and thus history consists of facts that exist objectively. With this concept of history, for Ms. Hu, teaching history to students is simply teaching them facts.

Ms. Chen's concept of history is similar to that of Ms. Hu: "History is what happened in the past. All events that happened in the past -- as we see them now -- they all represent history. I told children that anything that happened prior to the present time represents history" (Chen, I # 4, 2/5/98). When asked about history that is taught in the schools, Ms. Chen explained it as "events, people, time, and places, which are organized logically and in a sequence" (Chen, I # 4, 2/5/98). She also contends that history consists of facts and that the history taught in schools should teach students the facts:

History is facts. We teach history to students so that they know the facts about what happened before. "History" is fixed and unchangeable because it is about facts. For instance, our national founder, Sun Yat-sen, conducted ten military actions aimed at overthrowing the Ching dynasty. This is a fact. Nobody can deny it and change it into eleven times or whatever. Another instance, that the Anti-Japanese War took place in 1937 is also a fact. And all of these facts are the history that we study in textbooks. Nobody can change these facts. Therefore, students learn the same accounts from any history text. (Chen, I # 4, 2/5/98).

Clearly, Ms. Chen sees facts in the same way as Ms. Hu: Facts are facts, immutable, unchanging. Whatever history books you read, you encounter the same facts. Both Ms. Chen and Ms. Hu's concepts of history are problematic in their failure to realize the interpretative nature of history. Carr (1964) refers to the kinds of conceptions of history held by both Ms. Hu and Ms. Chen as "fallacious": "The belief in a hard core of historical facts existing objectively and independently of the interpretation of the historian

is a preposterous fallacy, but one which it is very hard to eradicate" (p.10).

It is clear that not everything that happened in the past becomes history. To become a historical fact, an event has to be significant. As Hexter (1971) noted: "To be history, an account must be important, and to be important, it must be about what was important in the past" (p. 46).

Neither Ms. Chen nor Ms. Hu considers historical events to be more or less than what happened in the past. They also do not realize that history takes into consideration only significant facts, which were selected and decided by historians, who determine what is history and what is not. Accompanying this misconception, they treat history as a collection of facts that exist independently of historians' interpretations. As Carr (1964) noted: "It used to be said that facts speak for themselves. This is, of course, untrue. The facts speak only when the historian calls on them: it is he who decides to which facts to give the floor, and in what order of context" (p. 9). History is indeed full of facts but the facts do not become known by themselves. For Kammen (1987), who holds the same view as Carr, facts are "like so many cows on the farm. They have to be searched for, more like missing sheep" (p. 177).

Another problematic conception of history found in Ms. Chen's and Ms Hu's understanding of history concerns what events can be identified as historical facts. Ms. Chen believes that facts such as Sun Yat-sen's ten military actions and the date of the Anti-Japanese war are historical facts. Ms. Hu also believes that the date of the 2/28 incident is a historical fact. Thus, they assert that historical facts like these are unchangeable and held in common by different history books. In a discussion about how to distinguish the facts of history from the facts of the past, Carr (1964) indicated that





there were certain “basic facts” which were the same for all historians and which form the backbone of history. However, as Carr (1964) notes, the basic facts are the raw material of the historian rather than history itself.

Mr. Lin’s view of history, not surprisingly, was different. He defined history as “the textual records of what happened in the past” (Lin, I # 4, 1/19/98). Unlike Ms. Chen and Ms. Hu, he does not believe that history faithfully reflects facts or that history is fixed. Rather, he believes that there can be many histories for one event. He noted that, the factors that influence and shape the construction of historical interpretations include new evidence, the biases of dominant classes and politicians, and a historian’s subjectivity:

Historians have constructed a variety of interpretations of the same events. History is interpreted. The accounts of history are not necessarily fixed in a single version. Many things influence how history is interpreted. For instance, over time, new historical materials emerge as new evidence and, accordingly, new interpretations and new textual records replace previous ones. In addition, contemporary powers that dominate society also play a role in influencing historians’ interpretations, especially in the case of authoritarian politics. The historian is also a factor because the historian brings his or her own view to the selection of historical facts and the construction of historical accounts of history. (Lin, I # 4, 1/19/98)

In order to triangulate the data pertaining to the three teachers’ understanding of the interpretative nature of history, I asked a question concerning what historians do. I had the same purpose, to elicit the three informants’ knowledge about history and the complexities involved in teaching history.

#### **What Do Historians Do When Studying History?**

Ms. Hu believes that the historian’s primary work is “seeking what happened in the past” (Hu, I # 4, 1/20/98). For her, the historian’s work of “seeking facts” involves



studying and checking previous historiography written by others historians to “check the validity of history.” She emphasized that the process of research in history is essential to digging out facts. She also emphasized that historians should keep an objective and neutral stance in the process of writing history; they should not weave their own opinions and emotions into their accounts of past events and historical figures. When I probed her as to what she meant by “keeping an objective and neutral stance,” Ms. Hu invented two different accounts about the 1997 local elections. For Ms. Hu, the following is the account that was written by a historian who held an “objective stance”:

Under the political system of local autonomy, the KMT has been the ruling party for the past several decades. Due to the lifting of the ban on forming political parties, a group of people whose view differed from that of the ruling KMT formed a new political party. As a result of gaining increasing support from voters, in the 1997 local elections, candidates of the new party, for the first time in Taiwan’s history, were elected to more positions than the KMT candidates. (Hu, I # 4, 1/20/98)

Ms. Hu created another account that she believed was written by a historian who operated from a “subjective stance” (I highlight what she considered to be the subjective interpretation):

Because the KMT government has been involved in scandals about money, corruption, and gangsters, the public is very disappointed with the ruling party. In the 1997 local elections, therefore, reflecting the spreading public disappointment -- the opposition party (the DPP) -- for the first time was elected to more positions in local governments than the KMT. (Hu, I # 4, 1/20/98)

Ms Hu specifically indicated that historians should not use the words “involving scandals” and “spreading disappointment.” She said that these descriptions involved the historian’s personal judgment.

Ms. Chen’s understanding of the historian’s work is similar to that of Ms. Hu.

Ms. Chen believes that historians ought to “let people see the real facts” (Chen, I # 4,

2/5/98). She also emphasized the need for an objective stance:

A historian should maintain his or her objective stance in writing history. Historians should not weave their subjective opinions into their writing. The work of writing history is not equal to the work of writing novels; the authors of novels can write stories based on their emotions and opinions, but this is not for historians. Historians should not make any judgment concerning historical events and historical figures. (Chen, I # 4, 2/5/98)

Carr (1964), however, suggests that no writing of history is purely objective, indicating that historical facts are always processed by historians: "The facts of history never come to us "pure," since they do not and cannot exist in a pure form; they are always refracted through the mind of the recorder" (p. 24). According to Carr, historical facts are selected, organized, and interpreted through the lens of the historian. Thus, historians -- and their values, personalities, world views, even politics -- play a significant role in the writing of history. Carr explained that history is "a continuous process of interaction between the historian and his facts, an unending dialogue between the present and the past" (p. 35). But Ms. Chen and Ms. Hu do not regard the role of the historian in the writing of history in this way.

Alternatively, Mr. Lin noted the inherent role of judgment in the creation of historical knowledge:

Historians do not only do the work of collecting and checking historical materials to find evidence. More importantly, historians use their judgment and interpretation to organize historical materials, original documents, and relics, so that they can tell us stories of the past. (Lin, I # 5, 1/21/98)

The three participants have different understandings of the historians' work. Ms. Chen and Ms. Hu both believe that historians should keep an objective stance in writing history -- implying that this possible -- while Mr. Lin indicates that he understands that the historian's work involves judgments and interpretations. The way that Ms. Hu and

Ms. Chen view how historians work demonstrates that they lack an awareness of the interpretative nature of history. Alternatively, they believe that the mainstream account, dominated by the KMT, and that the KMT is "objective" while opposing forces are "subjective."

### **Taiwan History Interpreted from a Taiwanese-centered Perspective**

Neither Ms. Chen nor Ms. Hu has a clear sense of what holding a perspective concerning history means. Ms. Chen thought that a Taiwanese-centered perspective was any version that included more information about Taiwan and less about China. Ms. Hu articulated the same view: "it would give more details on historical events and figures that are related to Taiwan and give less attention to things related to China" (Hu, I # 4, 1/20/98). For each of them, perspective was a matter of emphasis, not interpretation.

Through Ms. Hu and Ms. Chen's eyes, the traditional textbook account of Taiwan's history is the "real account of Taiwan history." Asked about her opinion of the new version of Taiwan history, which is interpreted from a Taiwanese-centered perspective, Ms. Hu declared that it was "a plot that the opposition has to interfere with the study of history; the study of history should be separated from politics" (Hu, I # 4, 1/20/98). But as historians note, history is never separated from politics. Because Ms. Hu sees no interpretation in the process of doing history, she can't see the prescribed textbook version of Taiwan history as political. For her, history is or at least can be a "pure" academic work. Moreover, while she adheres to her own Chinese-centered perspective, she sees a new Taiwanese-centered version of Taiwan history as a "political plot."

WATERGATE  
PUBLICATIONS



Similarly, Ms. Chen sees the new Taiwanese-centered perspective as one that “cannot be regarded as authentic account of Taiwan history” because “it intentionally omits the significant historical facts of Taiwanese ancestral origins.” For her: “The narrative of Taiwan history should indicate the close relationship between Taiwan and China and put Taiwan in the context of China; otherwise, how do you explain where our ancestors came from and who we are?” (Chen, I # 4, 2/5/98)

Mr. Lin’s perspective is quite different. He strongly approves of the new versions of Taiwan’s history, objecting to the traditional version because it portrays “Taiwan on the periphery of China” (Lin, I # 5, 1/21/98). For Mr. Lin:

Taiwan history is central to the development of Taiwanese people’s perspective, experiences, and lives. The accounts of historical events and figures are interpreted through the view of people in Taiwan, not through the perspectives of foreign rulers and people who do not live in Taiwan.” (Lin, I # 5, 1/21/98).

The three informants’ understanding of the interpretative nature of history parallels their substantive knowledge of Taiwan history. For Ms. Hu and Ms. Chen, Taiwan’s history is linked to the history that has traditionally been presented in schools, devoid of interpretation, and singular in view. For them, a Chinese-centered perspective is the “real history of Taiwan.” For Mr. Lin, Taiwan history goes beyond the textbook, and he believes that Taiwan history should be interpreted from a Taiwanese-centered perspective.

So far in this chapter, I have discussed the three informants’ political orientations and subject matter knowledge of Taiwan history. In the last section, I attempt to explain the relationship between these two characteristics. My assumption is that in all three cases, a teacher’s understanding of Taiwan history is closely related to his or her political

orientation.<sup>31</sup> To test this hypothesis, I proceed to analyze each informant's account of Taiwan history towards the goal of better understanding how the three teachers view Taiwan history through the lens of their political orientation.

### **One's Political Orientation as A Lens for Understanding Taiwan History**

Historians in the field of Taiwan history indicate that, traditionally speaking, the official school knowledge taught in textbooks of Taiwan's history is based on the interpretation of Chinese nationalists and especially the KMT's Chinese nationalism. In order to cultivate students' Chinese identity, this account of Taiwan history follows these four central themes:

1. It stresses the contributions made by Chinese settlers and Ching's administration so as to reinforce the connection between Taiwan and China.
2. It largely ignores the role of Taiwanese aboriginal tribes in Taiwanese history.
3. It portrays the colonial rule of the Dutch and the Japanese as "repression," omitting their contributions to the development of Taiwan.
4. It glorifies the KMT's administration of Taiwan since 1945, following the official view (Dai, 1993; Weng et al., 1992; Wu, 1994 a).

In what follows, I examine the three teachers' accounts of Taiwan history according to these four themes.

#### **Theme One: Who Made Contributions to the Development of Taiwan?**

In discussing foreign rule of Taiwan, Ms. Hu and Ms. Chen spoke of "oppression" and "exploitation." When asked about topics pertaining to Japanese contributions to the

---

<sup>31</sup> I do not mean that people who hold a Chinese identity necessarily know less about Taiwan's history or that people who hold a Taiwanese identity know a lot about Taiwan's history.

However, in the analysis of these three cases, it appears that the participants' understanding of Taiwan's history is influenced by their national identities.





improvement of Taiwan's development, they had no idea. Ms. Hu emphasized that Taiwan's development was exclusively due to the Cheng family and Ching officials' administration. For instance, she made a sharp contrast between the rule of the Cheng family and the Dutch in developing education: "Cheng Cheng-kung devoted himself to the education of Chinese settlers but the Dutch did not educate them. The Dutch wanted all Chinese settlers to be ignorant and stupid so that they could take advantage of them and control them easily" (Hu, I # 5, 1/ 22/98). Ms. Hu emphasized that due to the efforts of Liu Ming-chuarn, a Ching official, Taiwan became "the most advanced province of China" (Hu, I # 3, 2/3/ 98). Similarly, Ms. Chen described Cheng Cheng-kung as the one who "accomplished the greatest achievements concerning the development of Taiwan" (Chen, I # 5, 2/15/98).

On the other hand, Mr. Lin believes that the Dutch and Japanese, although they colonized Taiwan, also made considerable contributions to its development. He did not see the Ching administration as exclusively responsible for the development of Taiwan: The Chinese Ching dynasty ruled Taiwan for 212 years but they only spent the last 20 years mindfully administrating Taiwan. The Ching dynasty might have contributed to building Taiwan but they are not the only ones and the others are not given much attention (Lin, I # 4, 1/ 19/98).

### **Theme Two: The Connection between Taiwan and China**

Both Ms. Chen and Ms. Hu assume that the connection between Taiwan and China was never broken, even when Taiwan was ceded to Japan between 1895 and 1945. Ms. Hu emphasized that during the era of Japanese occupation, an anti-Japanese resistance movement was led by a member of Sun Yat-sen's revolutionary party, thus

1870  
1871  
1872

1873  
1874  
1875

proving that China always kept Taiwan in mind and always wanted to recover it. Ms. Chen misunderstood the establishment of the Taiwanese Daily News, seeing it as a vehicle to cultivate Chinese nationalism among the Taiwanese rather than Taiwanese nationalism, which is more accurately the case.<sup>32</sup>

The Taiwanese Daily News was established to promote *ming-tzu yih-shyh* (Chinese nationalism) during the Japanese rule. Its founders were a group of Taiwanese intellectuals. They went to China to study and then came back to Taiwan committed to the promotion of Chinese nationalism among the Taiwanese. (Chen, I # 5, 2/5/ 98).

Mr. Lin is aware that China and Taiwan did not have a close relationship during Japanese rule, noting that since then the two Chinese societies have developed into two countries with different cultures, political systems, and histories. Under Japanese administration, he believes, the Taiwanese tried to survive but that this had nothing to do with Chinese nationalism or the idea of returning to the motherland. He stressed that the Taiwanese under Japanese colonial rule were citizens of Japan and Taiwanese elites adopted this identity; they only asked the Japanese emperor to allow the Taiwanese to exercise their citizenship in the selection of Taiwanese representatives to the Japanese Congress. Mr. Lin realizes that the government formula, that “the Taiwanese resisted Japanese rule and developed Chinese nationalism” during the period of Japanese rule reflects the bias of the Chinese-centered perspective.

### **Theme Three: Taiwanese Aboriginal Tribes**

Ms. Chen’s understanding of Taiwanese aboriginal tribes is biased and full of

---

<sup>32</sup> The Taiwanese Cultural Association members issued the Taiwanese Daily News to advocate a Taiwanese consciousness among Taiwanese. They attempted to use this newspaper as a tool to gain more political freedom and civil rights under Japanese rule.

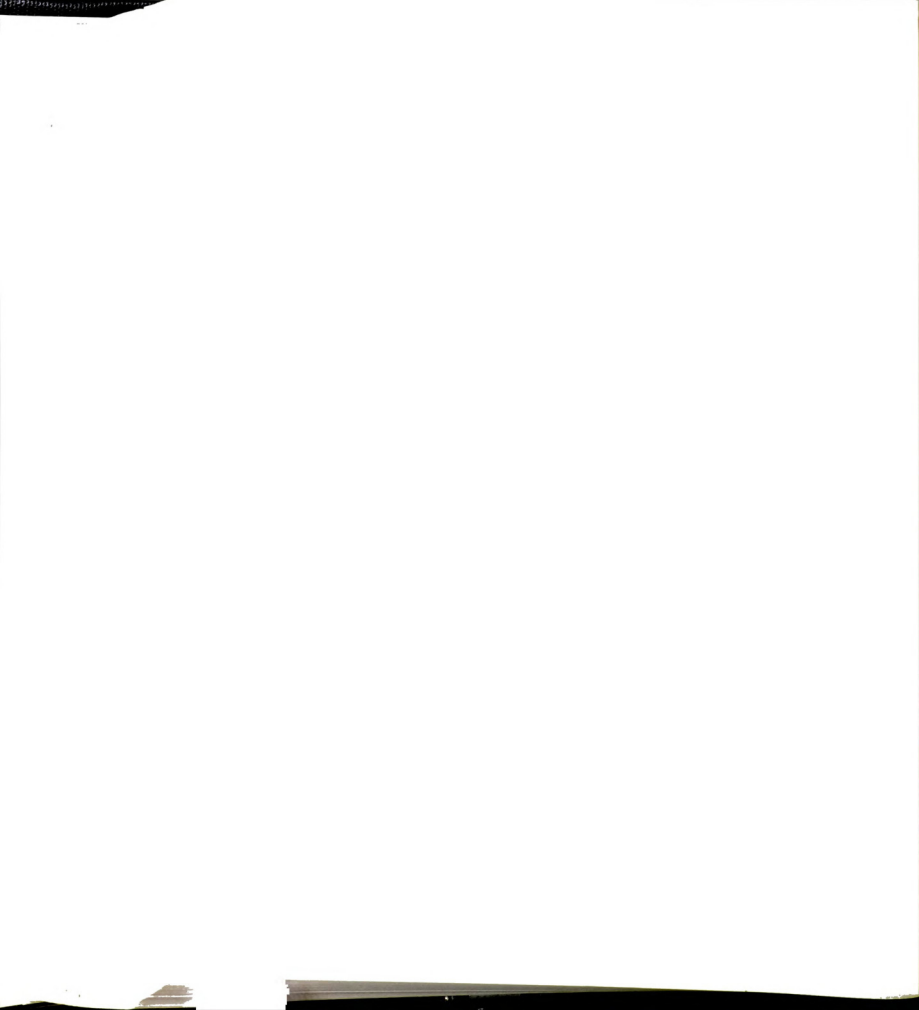


racism. She holds a derogatory and stereotypical view of aborigines and their history: They had a custom of cutting off human heads and they often attacked Chinese settlers. Therefore, the Ching officials implemented the policy of confining them to the mountain areas (Chen I # 5, 2/15/98). When asked about aborigines' land rights and the relation between aborigine landowners and Han tenant farmers, both Ms. Chen and Ms. Hu grossly distorted the situation, claiming that aborigines did not own their own lands and rented lands from the Ching government. In a response to a question about the Ching government's policy of "opening up of the mountains and the pacification of the aborigines," Ms. Hu said that the policy was good for Chinese settlers because aborigines at that time "were a big problem for Chinese settlers." She failed to consider the policy of opening up of the mountains from the aboriginal tribes' perspective. Obviously, both Ms. Hu and Ms. Chen are constrained by a very narrow, Chinese-centered perspective on the question of the aboriginal tribes.

Mr. Lin offers an interesting contrast. He knows that Taiwan originally was an island where only the aborigines lived, that the Chinese Han came to Taiwan and forced the aborigines to move, only later assimilating them into the Chinese community. He stated that the aborigines originally owned their lands prior to Chinese settlement, and that Chinese settlers were "crafty" and stole the aborigines' lands. He emphasized the importance of the fact that Chinese settlers -- mostly single men risking their lives to cross the Taiwan Strait -- married *Pin-po* women. Therefore, the Taiwanese' lineage is a mixture of Chinese Han and *Pin-po* ancestors.

#### **Theme 4: The KMT's Rule of Taiwan**

According to the textbooks, the KMT administration of Taiwan after 1945 is



portrayed as a successful experience, transforming Taiwan into a democratic and prosperous island. This is also the view adopted by both Ms. Chen and Ms. Hu.

With respect to their understanding of the 2/28 incident, Ms. Hu and Ms. Chen share the idea that the incident was a result of the tension between Taiwanese and mainlanders. Both of them appealed to the need to “maintain social order” to justify the killing of Taiwanese by KMT troops. In recent decades, both historians and the media have searched for the truth concerning the incident and pursued the investigation of the causes of the incident. Ms. Hu claimed that that it was not necessary to do so because, for her, this historical event was used by the DPP to create a social cleavage between Taiwanese and mainlanders:

I think that it is not necessary to dig out the “truth” of the incident. How do we know which account is true? The event took place 50 years ago and government archives about this event were destroyed afterwards. How do people seek the truth? The DPP, in particular, always takes advantage of this event for its political interests, triggering tension between Taiwanese and mainlanders. We must just keep in mind that we must never let such a thing happen again. That is enough for us to learn about the incident. (Hu, I # 5, 1/ 22/98)

When asked about the topics concerning the KMT’s policies, both Ms. Chen and Ms. Hu demonstrated a positive attitude towards the KMT. For instance, with respect to martial law, Ms. Chen said that the purpose of the law was to maintain societal stability. For Ms. Hu, “It was good for people in Taiwan since we faced threats from the Chinese Communists” (Hu, I # 5, 1/22/98). As to the land reform policy, which was implemented right after the KMT’s retreat to Taiwan, both Ms. Chen and Ms. Hu appreciated it as “a policy to increase the welfare of all tenant farmers and reduce the gap between the rich and the poor at that time” (Hu, I # 5, 1/22/98). Ms. Chen praised it as “President Chiang’s innovation, aiming to improve the lives of Taiwanese farmers” (Chen, I # 5,



2/15/98). They offered no criticism whatsoever of the ruling KMT, even with respect to the massacre in the wake of the 2/28 incident.

Mr. Lin's understanding of these realities stands in sharp contrast to that of Ms. Chen and Ms. Hu. For him, "One of the crucial consequence of the 2/28 incident was that having been appalled by the brutal killing of the KMT, since then, the Taiwanese maintained a discreet silence concerning Taiwan's politics until the 1970s" (Lin, I # 4, 1/19/98).

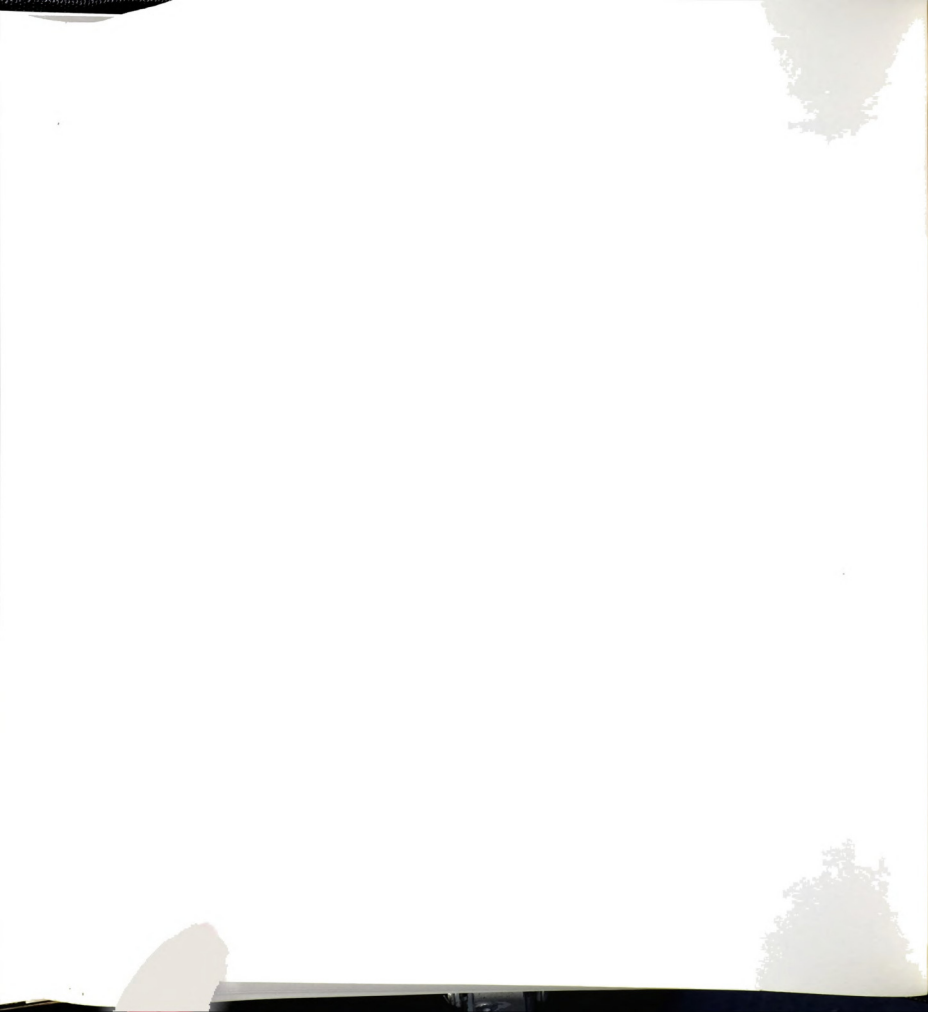
Mr. Lin's Taiwanese-centered perspective also allowed him to see the self-interest that lay behind the KMT's land reform policy. He believed that by implementing the land policy, the KMT government intentionally trimmed away the power of local Taiwanese leaders and won the majority of tenant farmers' support.

The participants' understanding of Taiwan's history clearly reflects their political orientation. Both Ms. Hu and Ms. Chen, who possess Chinese identities, interpret Taiwan history from the standpoint of the KMT and emphasize the connections between Taiwan and China. Mr. Lin, who is a Taiwanese nationalist, understands Taiwan history through the lens of his political orientation, adopting an alternative interpretation.

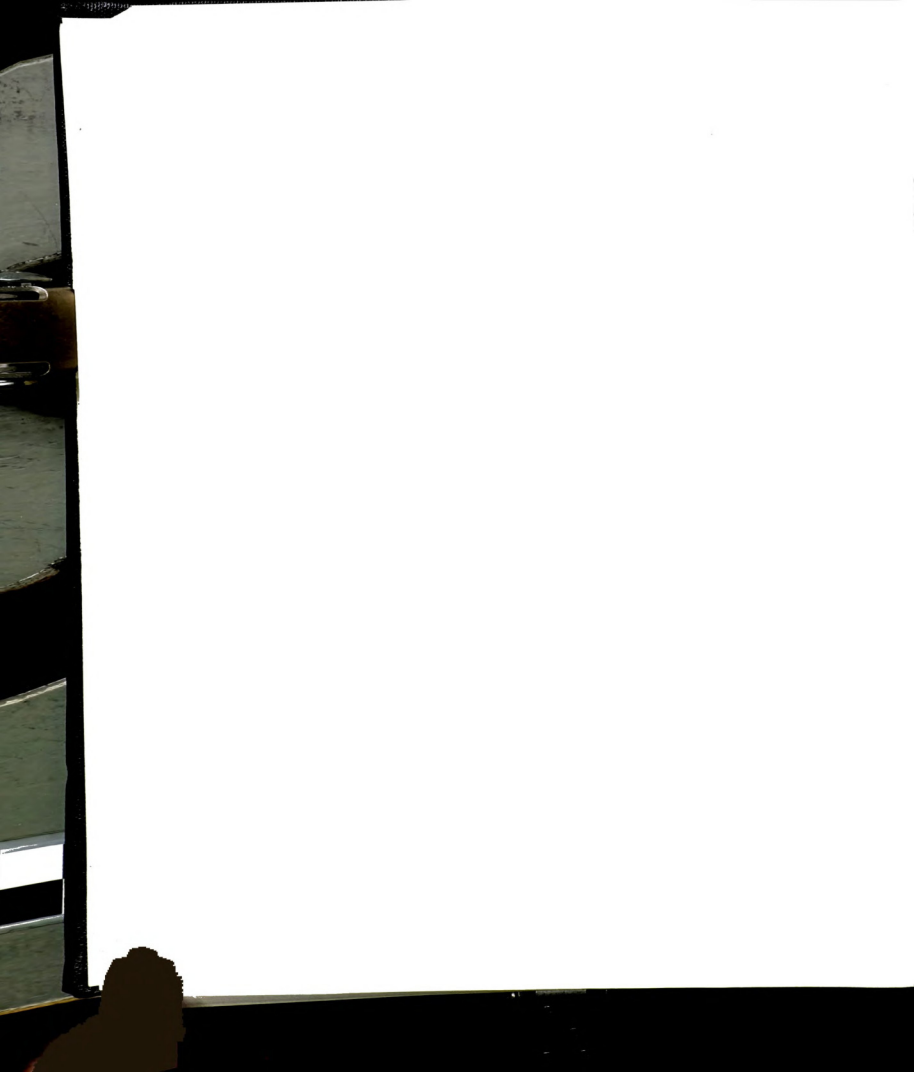
The examination of the three informants' political orientations and subject matter knowledge suggest that the component of political orientation in each participant serves as an overarching factor that determines his or her understanding of Taiwan history. The purpose of this study has been to explore how teachers teach Taiwan history with regard to national identity formation. So far, we see differences in the teachers' knowledge and political beliefs. Are there parallel variations in their teaching? Thornton (1988) found that for some teachers, their transmitted curriculum and planned curriculum lacked



consonance. Evans (1993) also indicated that in his research on history teaching that what teachers said they would do in classrooms was not necessarily what observers would see in those teachers' classrooms. To further understand the teachers' role in teaching national identities, I entered the classrooms and observed the three teachers' practices. In the next chapter, I present vignettes of teaching practice for each teacher. In addition, the teachers' educational philosophies concerning the teaching of Taiwan history will be explored so as to explain why they taught in the way that they did.



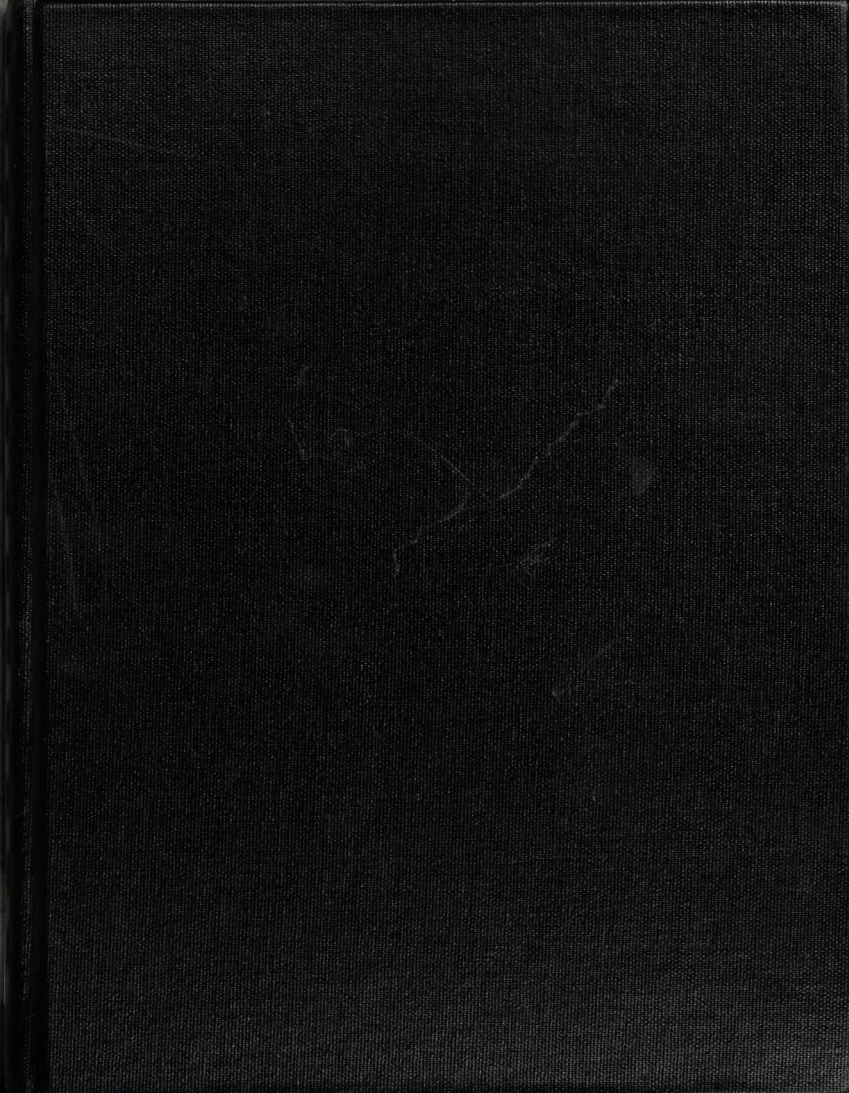




MICHIGAN STATE UNIV. LIBRARIES



31293018128664





THESIS

5  
1999

MICHIGAN STATE LIBRARIES



3 1293 01812 8672

**LIBRARY**  
**Michigan State**  
**University**

PLACE IN RETURN BOX to remove this checkout from your record.  
 TO AVOID FINES return on or before date due.  
 MAY BE RECALLED with earlier due date if requested.

DATE DUE	DATE DUE	DATE DUE
<del>JUL 2 0 2001</del>		
<del>JUL 0 5 2002</del>		
<del>AUG 2 0 2005</del>		

**THE DEMOCRATIZATION OF TAIWAN'S  
SOCIAL STUDIES CURRICULA:  
A STUDY OF TEACHING NATIONAL IDENTITIES  
VOLUME 2**

By

Phone-mei Chou

**A DISSERTATION**

Submitted to  
Michigan State University  
in partial fulfillment of the requirements  
for the degree of

**DOCTOR OF PHILOSOPHY**

Department of Teacher Education

1999

## **CHAPTER FIVE**

### **VIEWS OF NATIONAL IDENTITY FROM CLASSROOMS**

My central purpose in this chapter is to describe and to further explore how these three teachers' political orientations and subject matter knowledge play a role in their teaching. In the previous chapter, I argued that there were dramatic variations with respect to the political orientations and subject matter knowledge among the three teachers. My hypothesis has been that these ideological variations are reflected in their teaching styles and the content of their instruction. In this chapter, I present vignettes of classroom practice in each classroom. I also discuss each informant's beliefs concerning his or her purposes for teaching and learning of social studies, in general and with particular reference to Taiwan history.

#### **Ms. Chen**

Social studies class is an important course. I believe that the most important purpose of this class is to cultivate my students' ability to think independently. I hope that they will be able to make wise judgments. When they grow up, responding to whatever they see, [I hope] that they will possess the insight necessary for understanding what is happening in this society and making correct judgments on their own. (Chen, I # 1, 9/12/97)

Ms. Chen believes that she needs to connect the subject matter of social studies to students' lives. As she sees it, the most important purpose for teaching social studies is to cultivate students' abilities for problem solving, and critical and independent thinking. Learning history is especially valuable, in Ms. Chen's view, because historical figures and events provide lessons that enable students to gain important insight, thus helping them avoid repeating the mistakes of their ancestors.

When I asked her why students need to learn Taiwan history in particular, Ms. Chen answered in a circular fashion: Because they live on the island of Taiwan, students need to understand Taiwan's past. When I probed for specific reasons why students needed to learn about Taiwan's past, she talked about what she saw as the principal purposes of teaching and learning Taiwan history. Her purposes are closely related to her view of national identity: "To cultivate students' love for this island" (Chen, I # 4, 2/5/98) was one such purpose while cultivating a Chinese identity in students was another.

In teaching Taiwan history, I want students to appreciate the historical fact that our ancestors came from *da-lu* (the Chinese mainland). Children need to know that without our Chinese ancestors' adventures, and efforts to open up this island, it would be impossible for us to lead a good life in Taiwan today. I stress the point that our ancestral home is on the mainland. If you are not aware of our ancestral roots, you do not really understand Taiwan history at all. (Chen, I # 4, 2/5/98)

For Ms. Chen, it is not enough for students to merely learn historical facts; she wants to help them become "objective" thinkers, capable of "making reasonable judgments" concerning the controversial issue of national identity. She wants her students to learn "a correct concept of who they are," not to blindly follow what she sees as the biased assertions of extremists, which include, for her, calls for "independence":

Teaching history does not mean only teaching students about historical events and figures but also how to distinguish correct views from biased views. In today's society, we face many conflicting views. For instance, our government asserts that there is only one China, while the extremists call for independence. Students are so confused with these different views. I want to help them to make correct judgments concerning these assertions and develop correct values. I hope that my students will not blindly follow the extremists. (Chen, I # 4, 2/5/98)

Clearly, Ms. Chen intends to cultivate a Chinese identity among her students. At the same time, however, she assumes that her role as a teacher is "neutral" and

“objective” with respect to the transmission of her views concerning national identity.

She sees her position as ideologically neutral because, for her, she teaches historical “facts.” On the other hand, Ms. Chen also claims that it is inappropriate to bring controversial issues -- especially political party preferences and the issue of independence versus unification -- into the classroom. In her school, parents protested when some teachers explicitly criticized political parties (either the New Party or the DPP), claiming that these teachers were trying to impose their own political orientations on students. As a result, Ms. Chen is cautious, never explicitly commenting on political parties or openly criticizing the DPP’s call for independence. Ms. Chen claims that she sticks to the historical facts. As she sees it:

Teaching history inevitably involves complicated issues like these: Why do Chinese Communists claim that they represent China and our government also claims that the ROC represents China? As a teacher, I have an obligation to tell students the truth. I believe that teachers should not influence children’s judgments and choices of their identity. But I have to tell children the facts and explain reality. I want children to understand the fact that the KMT established the ROC on the mainland in 1912 and then moved to Taiwan. Therefore, currently, there are two Chinas, one on the mainland and the other on Taiwan. Students also need to know the historical fact that all our ancestors came from the mainland. These are historical facts. I do not say anything about national identity. I leave children free to choose whether or not they want to be independent or unified with the mainland. As teachers, we should not tell them which form of national identity is better. Let them make a decision about this issue themselves, when they grow up. (Chen, I # 4, 2/5/98)

It is clear, however, that emphasizing the “factual” knowledge that she selected, Ms. Chen intends to use the subject matter provided by the textbook to transmit a Chinese identity -- despite the fact that she claims to remain ideologically neutral in her teaching. There are two factors, in particular, that help to explain why Ms. Chen does not see the contradiction between what she intends to teach and the role that she

assumes in the teaching of Taiwan history. First, she does not view the textbook as a tool for the transmission of a Chinese identity. For her, the information found in the official textbooks is apolitical. This attitude corresponds with her lack of general knowledge concerning the interpretative nature of history. Thus, for her, following the textbook with respect to the teaching of historical facts assures the adoption of an objective stance on the issue of national identity. Second, in her eyes, when people advocate a Taiwanese national identity, this means that one is “imposing one’s sense of national identity on students.” Advocating a Chinese identity, on the other hand, according to her, does not represent a case of “imposing one’s sense of identity on one’s students.” She believes that advocating a Chinese identity naturally accompanies the teaching of objective historical facts. Therefore, she assumes that she is teaching students objective facts, and not imposing a Chinese identity on them, when, in fact, she is doing precisely that. In other words, as she sees it, the traditional form of instruction which glorifies ROC history, is not ideological, merely true.

There are 37 students in one of Ms. Chen’s fourth grade classes. These students are the sons and daughters of professors, doctors, public servants, teachers, managers of banks, and owners of private businesses. The parents of these students have high expectations concerning their children’s academic performance in school.

Students sit in clusters of five desks. To maintain classroom order, the students are forbidden to talk with their neighbors; Ms. Chen stands at the front of the classroom. While she is teaching, all of the students look at her. The students are well behaved, raising their hands in order to speak and always waiting for Ms. Chen to call on them.

Because she serves as the director of the teaching division in this school, Ms.

Chen only teaches three classes, all fourth grade social studies.<sup>1</sup> In the class that I observed, she followed a routine from the beginning of the class. Ms. Chen begins by writing two or three questions that she had assigned in the last class on the blackboard. For this particular unit, Ms. Chen selected 45 questions from the teachers' manual. The majority of these questions required a recitation of textbook content and generally pertained to a superficial comprehension of historical events and figures: How did Cheng Cheng-kung recover Taiwan? What are the contributions made by Cheng family rule to the development of Taiwan? Under Japanese colonial rule, how did the Taiwanese people live? Why did Taiwanese people resist Japanese rule? Similar to many traditional social studies classes in the U. S., these questions can be answered directly, briefly, and simply by reciting the "answers" provided in the textbook. Ms. Chen then asks students whether or not they obtained information about these questions at home. Some students raise their hands to show that they did. Ms. Chen calls on one or two specific students who raise their hands, testing their understanding of the answers. If no one responds to her questions, she asks students to "discuss" the questions in small groups for one or two minutes. During these discussions, certain students who collected answers about the questions read their answers to the small group. When students finish reading, the group members clap in unison, signaling that they have finished their discussion.

Ms. Chen then returns to instructing the entire class, calling on one or two students to report on what they now know about the question. Students' responses are

---

<sup>1</sup> In Taiwan's schools, the teaching division is responsible for a variety of concerns: arranging teachers' schedules, documenting students' grade books, conducting periodic examinations with respect to the school's basic requirements, and supervising the pace at which the teachers cover weekly textbook material.



brief, never more than one or two sentences. Ms. Chen often asks students questions that require them to respond in a “fill-in-the-blank” mode: “When did Liu Ming-chuarn arrive in Taiwan?” “1883.” “Why did he come to Taiwan?” “Because of the war between China and France.” “Who won in the war?” “China.” As students respond, Ms. Chen nods, simply saying “right.”

Towards the end of each class period, Ms. Chen writes two or three new questions on the chalkboard. Students are told to gather information about these questions in preparation for the next class. Afterwards those students who had collected information for the previous day’s questions automatically come up to the teacher, stand in a line, and wait for Ms. Chen’s “evaluation.” Students open their books to the pages where the answers to the questions are located, showing the pages to Ms. Chen. The texts that students collect at home are diverse, ranging from books, copies of one or two pages of texts, and information downloaded from the Internet. Some of these books are more suitable for adults than for elementary school students. Ms. Chen glances at each text, nodding, and recording grades according to the students seat number as listed in the grade book. The whole process takes less than 10 minutes. Ms. Chen does not ask students what they know about the texts, what they think of the content that they read, what differences they might have noted between the textbook and the supplementary materials that they collected, or whether they have any questions.

Ms. Chen describes her approach to teaching social studies as “constructivist.” In recent years, Ai-guor Elementary School has been one of several experimental schools selected by the Ministry of Education to develop a constructivist approach to teaching of mathematics. Curriculum designers and teacher educators have conducted workshops to

demonstrate the constructivist approach to teachers in the school. As the director of the teaching division, Ms. Chen attended a workshop and several meetings to learn about this innovation. She described what she learned as follows:

The teacher does not lecture all the time; instead, the teacher often asks students questions to stimulate their thinking and to encourage them to express their own opinions. By asking students questions, the teacher guides students, helping them to acquire knowledge on their own. Sometimes students work cooperatively in small groups to solve problems. The teacher provides opportunities for individual students to talk about how they found answers. Students are encouraged to develop different approaches to finding answers. If students have different opinions, the teacher facilitates discussions, giving them the opportunity to explain why they have different opinions. (Chen, I # 6, 2/25/98)

Ms. Chen claims that she applies the constructivist approach that she learned from the mathematics workshop to her social studies classes and she believes that no other teachers were utilizing the approach in their social studies teaching. She is critical of the traditional approach to social studies teaching (the teacher lectures while students listen passively), arguing that teachers need to reform their teaching methods so as to cultivate students' abilities to think more critically:

In constructivist classrooms, the teacher is always patient, listening to children and taking their individual differences into account. The teacher should be aware of each student's level of understanding so that she can help students learn new information based on what students already know. The role of the teacher should be that of a facilitator who guides students through the thinking process, helping students to search for answers themselves, not directly giving students the answers. Students are encouraged to be active learners, looking for answers on their own. (Chen, I # 6, 2/15/98)

Based on what Ms. Chen observed in the mathematics workshop, she concluded that asking students questions represents the core of the new approach:

In constructivist classrooms, it is important to ask students questions. By asking them questions, I stimulate their thinking and encourage them to seek answers on their own. By framing questions, I direct students to think about content that is relevant. Once students have been introduced to the process of thinking for

themselves and searching for answers independently, they can more easily memorize the key information prescribed by the textbook. (Chen, I # 6, 2/25/98)

Ms. Chen's assertion that asking students questions helps them to memorize information is of critical importance. While asking students questions is, of course, important to progressive ideas about teaching, in this case, the correct answers to the questions, unfortunately, are pre-established and indisputable. This hardly represents an optimal way to enhance students' creative or critical thinking processes.

In addition to asking questions, Ms. Chen was also convinced of the importance of collecting information prior to the next the class, which she saw as an integral part of the constructivist approach. She organized her class around topics that were related to the textbook. In addition, she created a reward system to encourage students to research information in advance and to report what they had found in class.

When Ms. Chen explained why she believed that the process of collecting information prior to class, she talked about "constructing knowledge":

I ask students to collect information in preparation for the next class. The process of collecting information is a process of "constructing knowledge" on their part. Students differ from one another with respect to their level of prior knowledge. I do not assign extra texts for them to read; instead, they make their own decisions as to what texts to select, which meet their own capacity for understanding the material. I only assign questions. They seek answers from the texts they find at home. By doing so, they become active learners: seeking information on their own and making sense of the texts independently. This is very different from traditional teaching styles. I do not cram students' heads with textbook content. Rather, I encourage them to construct knowledge on their own. (Chen, Post-I # 4, 12/8/97)

In what follows, I present three vignettes of Ms. Chen's practice.

### **Vignette One: Our Ancestors Came from *Da-lu* (the Mainland)**

On December 11, 1997, Ms. Chen began class by writing two questions on the board: Which provinces on the mainland did the majority of the residents of Taiwan come from? Who were the earlier residents of Taiwan? During the previous class, she had asked students to collect information about these two topics in advance.

During the first part of this class, Ms. Chen discussed an assignment that was prescribed by the workbook,<sup>2</sup> a survey of students' birthplaces and their ancestral homes on the mainland. As she discussed this assignment, Ms. Chen focused on the second question. She wanted students to ask their parents and make sure that their parents' answers were correct:

The first question is not complicated. I believe your parents will not be confused over where you were born. But for the second question, your parents may be confused over your ancestral origin. In case your parents do not know the exact province that your ancestors came from, tell them that they have to ask your older family members about that. If your grandparents are dead, ask your parents to check the tombstones of your grandparents. It is our Chinese custom that one's ancestral home is written on one's tombstone after he or she dies.

Ms. Chen then informed students that in previous years, when students turned in this assignment, some students had made a mistake, claiming that their ancestral origin was the Taiwan Province. She asked students not to give that wrong answer again. When she asked students, "Who believes that the Taiwan province is the Taiwanese people's ancestral home? Raise your hands, if you think so!" five students still raised their hands. Ms. Chen called on a girl who sat in the front of the classroom and asked her why she believed that her ancestral home was Taiwan:

---

<sup>2</sup> There are 12 workbooks that accompany the textbook through the first to the sixth grade. When curriculum makers designed textbooks, they also designed the workbooks to help students become familiar with the textbook content. Students are required to work in the workbook as their homework, filling in chronological tables, writing short

S: Because my ancestors migrated from *da-lu* (the mainland) to Taiwan.

T: Right, because your ancestors emigrated from the mainland to Taiwan, your ancestors' original home was on the mainland not on Taiwan.

S: But after my ancestors immigrated to Taiwan and then they had children, my ancestors were born in Taiwan and they lived in Taiwan.

Ms. Chen then turned to the whole class, seeking other students' opinions about the girl's idea. Firmly adhering to the textbook, Ms. Chen defined "ancestors" as the first ancestors who emigrated from the mainland to Taiwan. Ms. Chen disagreed with the student's suggestion that ancestors could be defined as those who were born in Taiwan and who had always lived in Taiwan:

T: (Speaking to the whole class) All of you think again. Who believes that your ancestors were born on Taiwan? If you think so, raise your hands.

Three students raised their hands.

T: Okay. Who believes that your ancestors were not born on Taiwan? Raise your hands.

When the majority of students raised their hands, Ms. Chen called on one of them. The boy stood up and said that his grandparents had told him that their home was on the mainland. Ms. Chen then asked the whole class again whether or not it was correct that the Taiwanese people's ancestors were born on Taiwan. Another boy voluntarily stood up, offering his opinion:

S: I read a book about Taiwanese aborigines. According to that book, Taiwanese aborigines were the first residents of Taiwan, earlier than the other residents. I believe that only aborigines have ancestors who were born on Taiwan.

T: Yes, you are right. (Ms. Chen then turns to the girl who said that her ancestors were born in Taiwan). Are you an aborigine?

S: (Shakes her head with an embarrassed smile).

---

answers to questions, collecting newspaper clips, completing surveys. etc.

T: (Turns to the whole class) Look at me. Now, we arrive at the conclusion that if you were an aborigine, your ancestral home would be in Taiwan. Now, I ask you again. Are your ancestors aborigines?

Ss: No!

T: Since you are not aborigines, where is your ancestral home?

Ss: (Responding to Ms. Chen in unison) *Da-lu*.

When Ms. Chen attempted to move to the next topic, one boy was still not satisfied with this conclusion and without Ms. Chen's calling on him, he stood up and volunteered:

I think that our ancestral home might be in Africa. Because according to research, Africa is the home of primitive man. Thus, our distant ancestors who in the very early prehistory age would be Africans.

Ms. Chen regarded the boy as a troublemaker. She did not want to discuss the issue of Africans: "You went too far! Sit down!" The discussion about the Taiwanese people's Chinese roots stopped at this point, and the whole class laughed, implicitly agreeing with the teacher that the boy's idea was ridiculous.

For the remainder of the class, Ms. Chen introduced the subject of Taiwanese aboriginal tribes. In the textbook, there is only one short paragraph and several pictures that serve to introduce nine aboriginal tribal ceremonies. The textbook provides only highly abbreviated information:

Taiwanese aboriginal tribes<sup>3</sup> were the first inhabitants of Taiwan. They were scattered throughout different areas of this island. They made a living by farming, hunting, and fishing. The tribes varied with respect to their traditional dress and

---

<sup>3</sup> Taiwanese aborigines came from nine (or ten) culturally distinct tribes: Atayal, Saisiat, Tsou, Bunun, Paiwan, Rukai, Puyuman, Ami, Yami, and Thao. Most were scattered throughout the mountainous areas or the valleys of northern, central, eastern, and southern Taiwan (Chou, 1998; Hsieh, 1964).

ritual ceremonies. (NICT, 1993, social studies text, Volume 7, pp. 53-54)

In the old textbooks, the authors claimed that Taiwanese aborigines had also come from China; this information was deleted with the new textbook. However, Ms. Chen, remembering the information from earlier textbooks, simply added the old “knowledge” to her instruction, deliberately developing an argument that indeed Taiwanese aboriginal tribes also came from China. She told students that, in ancient times, geographically, Taiwan was connected to the mainland. Therefore, it is possible that Taiwanese aborigines emigrated from China to Taiwan:<sup>5</sup>

---

<sup>4</sup> Chinese nationalists in both Taiwan and China claim that many years ago Taiwan was part of China geographically. As a matter of fact, during the Ice Age (between 2 million years ago and ten thousand years ago), the islands of Taiwan and Japan were connected to the Asiatic continent as a whole. At that time, much of the Earth’s surface was covered with ice and the surface of the sea was much lower than what it is today. Between 18,000 and 10,000 years ago, the earth’s temperature rose and the ice melted. Consequently, the sea level rose as well, creating the Taiwan Strait that separates Taiwan from the mainland (Chou, 1998; Hsieh, 1964). According to anthropologists, during the late Ice Age (between 30,000 and 50,000 years ago) there were early residents of Taiwan came to the island, but it is not clear who they were and where they came from (Chang, 1969; Chou, 1998). It is possible that, during the late Ice Age, animals and humans could easily emigrate from the Chinese mainland to Taiwan since Taiwan was connected to the Asian continent. Nevertheless, there is no direct evidence that Taiwanese aboriginal tribes’ ancestors walked from China to Taiwan during the last Ice Age. Moreover, according to linguists, Taiwan’s aboriginal tribes belong to the Malayo-Polynesian family and their origins are connected to the islands located in between the Indian and Pacific Oceans (Bellwood, 1991; Chou, 1998).

<sup>5</sup> Chinese nationalists in both Taiwan and China claim that many years ago Taiwan was part of China geographically. As a matter of fact, during the Ice Age (between 2 million years ago and ten thousand years ago), the islands of Taiwan and Japan were connected to the Asiatic continent as a whole. At that time, much of the Earth’s surface was covered with ice and the surface of the sea was much lower than what it is today. Between 18,000 and 10,000 years ago, the earth’s temperature rose and the ice melted. Consequently, the sea level rose as well, creating the Taiwan Strait that separates Taiwan from the mainland (Chou, 1998; Hsieh, 1964). According to anthropologists, during the late Ice Age (between 30,000 and 50,000 years ago) there were early residents of Taiwan came to the island, but it is not clear who they were and where they came from (Chang, 1969;

T: Have you read any books about the prehistory of Taiwan? Try to imagine what Taiwan was like during the primitive age.

Ss: Underneath the sea.

Ms. Chen did not listen to the children's imaginative ideas. Instead, she wanted the children to take a look at the map of Taiwan and she used the map as a hint to induce children to think that Taiwan was connected to China in the ancient world:

Look at the map on page 7. On the map, the island of Taiwan is located near the Chinese mainland. Based on the map, let's imagine what Taiwan might have been like during the age of prehistory.

Ms. Chen wanted the students to say that Taiwan might have been connected to the mainland. However, her students were not inclined to think that that was the case. One student declared that: "Volcanic explosions might have happened on this island many years ago." Ms. Chen did not respond to the suggestion concerning volcanic explosions. Again, she asked the students to look at a map in the textbook:

Look at the map. Geographically, Taiwan is located near *da-lu* (the mainland). It is possible that in ancient times, the island of Taiwan was connected to *da-lu* as part of the huge continent.

One student volunteered that, according to a book that he had read, Taiwan had been connected to Japan. Thus, he believed that the Taiwanese people's ancestors might have come from Japan. In response, the whole class protested in unison: "You talk

---

Chou, 1998).

It is possible that, during the late Ice Age, animals and humans could easily emigrate from the Chinese mainland to Taiwan since Taiwan was connected to the Asian continent. Nevertheless, there is no direct evidence that Taiwanese aboriginal tribes' ancestors walked from China to Taiwan during the last Ice Age. Moreover, according to linguists, Taiwan's aboriginal tribes belong to the Malayo-Polynesian family and their origins are connected to the islands located in between the Indian and Pacific Oceans (Bellwood, 1991; Chou, 1998).



nonsense! Who wrote that book?” The student shut up. However, Ms. Chen took his words into account and went on to say that if Taiwan had been connected to Japan, it was also possible that Taiwan had been connected to *da-lu* (Chinese mainland). Based on these hypotheses, Ms. Chen went on to publicly infer that if Taiwan had been connected to *da-lu* in ancient times, it was possible that the ancestral roots of Taiwan’s aboriginal tribes were also on *da-lu*. Ms. Chen concluded:

Since Taiwan at that time was not an island surrounded by the ocean, but a land connected to *da-lu*, it was convenient for the ancestors of the Taiwanese aborigines, who had originally lived in China, to walk from there to here.

In the last few minutes of class, Ms. Chen asked students to take a look at the pictures of the aborigines in the textbook. She asked, “How do these mountain tribes live”? “Those tribes that live near the ocean, what do they live by?” Ms. Chen pointed at each photograph, asking students to explain them. Looking at the pictures, students answered in chorus: “dancing,” “wedding ceremony,” and “sacrificial rite.” Ms. Chen nodded with each response, providing no elaboration.

### **Vignette Two: Cheng Cheng-kung Recovered Taiwan**

Prior to this class, Ms. Chen had asked students to collect information concerning two questions: How did Cheng Cheng-kung recover Taiwan? What contributions did the Cheng family administration make to Taiwan’s development? Ms. Chen began the class by asking students what information they had collected about Cheng Cheng-kung. One student said that Cheng Cheng-kung had come ashore with his troops at a harbor named *Lu-el-mern*. After a short time, he expelled the Dutch from Taiwan. Ms. Chen stopped the student at this point and asked another question: “Why didn’t Cheng Cheng-kung surrender to the Ching emperor?” Students raised their hands and offered answers.

Several students explained that Cheng Cheng-kung was loyal to the Ming emperor. Ms.

Chen then elaborated:

Right. He was loyal to the Ming emperor. In order to protect the Ming dynasty, he transformed himself from a man of letters into a military official. Who has read the story about Cheng Cheng-kung taking an oath in a Confucian temple?

Several students raised their hands and Ms. Chen called on one of them. The student stood up and read his text:

He went to a Confucian temple. He knelt down, taking an oath: "I want to be a general to fight against the Ching enemy and to protect my country. I will take off my gown of letters and wear a military uniform and battle armor to fight the Ching troops."<sup>6</sup>

Ms. Chen then asked students to discuss two questions in groups: "Why did Cheng Cheng-kung use Taiwan as his military base? How did Cheng's troops land on Taiwan and expel the Dutch?" Some students volunteered to tell the other students about what they read. Ms. Chen called on several students to report on their group discussions. Ms. Chen then drew her own conclusion:

Cheng Cheng-kung is our national hero. He was loyal to the Ming emperor and he was very patriotic. It is a pity that he did not live past the age of 39. He died because he was exhausted by the development of Taiwan.<sup>7</sup> In addition, he was eager to recover the Ming dynasty. He lived for his dream to recover the Ming dynasty and to return to the mainland. However, he did not achieve his dream because he died so young.

---

<sup>6</sup> This episode of taking an oath in a Confucian temple is a legend. As a Chinese national hero, Cheng Cheng-kung has been portrayed as a loyalist who was a Confucius's student (Croizier, 1977).

<sup>7</sup> Cheng Cheng-kung arrived in Taiwan in April of 1661 and died in June of 1662. The causes of the death of Chang remain a "historical mystery" (Croizier, 1977, p. 27). There have been different accounts of the reason for his death: madness over his son's adultery; his disappointment in his generals' disobedience, his grief over his father's death; an unspecified illnesses, etc. (Croizier, 1977). However, none of these traditional legends include Ms. Chen's claim that Cheng Cheng-kung was exhausted by his efforts to

For the rest of the class, Ms. Chen asked the students to compare Dutch rule with the Cheng family's rule:

T: Consider this question: which one -- Dutch rule or Cheng Cheng-kung's rule -  
- considered the Taiwanese people's welfare to be a top priority?

Ss: Cheng Cheng-kung.

T: Tell me how the Dutch ruled the Taiwanese people?

Several students raised their hands. Ms. Chen called on one.

S: Under Dutch rule, the Taiwanese people were slaves of the Dutch.

T: How did the Dutch treat them as slaves?

S: The Dutch used them to make money. They exploited Taiwanese labor, treating them as animals, wanting them to work all day long.

T: Why were they so brutal?

S: Because the Dutch were foreigners. Foreigners often bullied us.

Ms. Chen ended this class by noting that only Chinese rulers benefited the Taiwanese people:

The Dutch were foreigners, they were not the same as us. The Manchu people, who formed the Ching dynasty, were also not the same as us; we are Han people. By contrast, Cheng Cheng-kung is Han; therefore, he truly loved the Taiwanese *turng-baau* (siblings) and devoted himself to the development of Taiwan.

### **Vignette Three: The Recovery of Taiwan**

During this class, Ms. Chen reviewed the section of the textbook which discussed Japanese colonial rule, the lesson that she had taught the previous day. In addition, she focused on the establishment of the ROC in 1912 and the Anti-Japanese War (1937-1945). According to the textbook, the recovery of Taiwan resulted from the victory of the

---

develop Taiwan.

ROC in World War II. Traditionally in textbooks, the accounts of Taiwan history end with a section on the recovery of Taiwan which exclusively focuses on the establishment of the ROC and their glorious victory in the war against Japan.

At the beginning of the class, Ms. Chen asked the students to give examples of Japanese colonial policies concerning Taiwan. Ms. Chen asked students to describe how the Japanese oppressed the Taiwanese. One student said that, “The Japanese conducted a land survey. They demarcated the boundaries of lands for landowners and tenants. And they. . . .” The girl was struggling to remember details about the land survey. Without giving the student time to collect her thoughts, however, Ms. Chen jumped in:

T: Then? After the Japanese demarcated the boundaries of lands, what did they do? Did the Japanese rulers confiscate the land of the Taiwanese landowners?

The student looked confused. Ms. Chen went on to say . . .

T: The Japanese conducted a land survey. Then, the Japanese occupied the land of the Taiwanese landowners. You do not need to mention the land survey. The key point is how the Japanese exploited the Taiwanese people’s properties and how they occupied the land of Taiwanese landowners. You should emphasize these points.

Students proceeded to volunteer a variety of Japanese colonial policies. One of them explained that the Japanese established a police force and strictly controlled the lives of the Taiwanese people, including checking standards of community hygiene and arresting criminals. Another student stood up and read an excerpt from a book that he had brought from home: “The Japanese collected a variety of heavy taxes from the Taiwanese, including taxes for selling tea and camphor.” Ms. Chen asked the student to continue reading:

The Japanese dominated the markets of rice, sugar, camphor, salt, and opium.

Under their monopoly system, the Taiwanese were prohibited from participating in the markets. Because sugar was one of the most important goods for export to Japan, Japanese rulers confiscated the Taiwanese people's lands and forced Taiwanese farmers to cultivate more sugar cane.

Ms. Chen stopped the student at this point and directed the students to contrast Dutch with Japanese rule. Through the comparison, Ms. Chen drew the obvious conclusion that, "Both of them were foreign rulers. Therefore, they unrelentingly repressed the Taiwanese people."

Launching into a discussion of the recovery of Taiwan, Ms. Chen asked:

T: Now, we will study the section on the recovery of Taiwan. Who recovered Taiwan from the hands of Japanese?

Ss: Chiang Kai-shek.

Ms. Chen then proceeded to explain the establishment of the ROC in 1912. She told the students that without the establishment of the ROC in 1912, the Taiwanese people would not have been freed from the repression of Japanese rule in 1945.

For the rest of the class, Ms. Chen mainly lectured. Her history of the ROC

focused on Sun Yat-sen and Chiang Kai-shek. Sun Yat-sen established the ROC in 1912. Chiang Kai-shek succeeded Sun Yat-sen and went on to defeat the warlords that opposed his rule by 1929. In 1937, Chiang Kai-shek started the Anti-Japanese War, which lasted until 1945. In her description of the war against the Japanese, Ms. Chen emphasized the importance of Chang Kai-shek's leadership. In addition, she told the students that, during the last four years of the war, the United States became involved in the war and formed an alliance to fight the Japanese and the Germans. The ROC was a member of the alliance. She highlighted Chiang Kai-shek's desire to recover Taiwan as a key factor for the



determination of Taiwan's fate, thus concluding that Chiang Kai-shek was the savior of the Taiwanese people:

T: During World War II, Taiwan suffered greatly from bombing. The United States bombed Taiwan because Taiwan belonged to Japan. Some young Taiwanese men were sent to serve in the Japanese army in southern Asia. Most of them did not survive the war. Feeling pity for the Taiwanese people's suffering under Japanese rule, President Chiang demanded that Japan return Taiwan to China. And when the Japanese lost World War II, they surrendered to the ROC. Therefore, Taiwan was returned to its mother country. You must keep in mind that the return of Taiwan is the most important event in Taiwan's history. In addition, we should remember the great man who recovered Taiwan and saved the Taiwanese people from the repression of the Japanese. Who is that person?

Ss: President Chiang (Chiang Kai-shek).

### **Reading the Vignettes**

Two Chinese-centered themes emerged as predominant across these vignettes. First, Ms. Chen emphasized the Taiwanese people's Chinese roots. Second, she focused on the contrast between foreign rulers' brutality towards the Taiwanese people and the kindness and benevolence of Chinese rulers, Cheng Cheng-kung and Chiang Kai-shek, the two "great men" who recovered Taiwan from the foreign rulers. They were presented as the primary heroes of the Taiwanese people.

Ms. Chen believes that these two themes are essential to teaching Taiwan history. During the first vignette, Ms. Chen wanted students to conclude that there was only one right answer to the question: "What is your ancestral home?" In the second vignette, she contrasted Dutch rule with Cheng Cheng-kung's rule, emphasizing the idea that, historically speaking, only Chinese rulers have contributed to Taiwan's development. To do so, she focused solely on the negative side of Dutch rule, entirely leaving out the fact that the Dutch made major contributions to the agricultural development of the island in

the early 17<sup>th</sup> century. In her discussion of Cheng Cheng-kung's rule, Ms. Chen claimed that, because the Cheng family shared the same Chinese lineage and culture with the Taiwanese people, they ruled with benevolence. However, according to historians, Cheng Cheng-kung's primary interest in Taiwan was as a military base for the recovery of the Ming dynasty. Several historians are also in agreement that the Cheng family's rule took the form of a colonial domination that was much more similar to that of the Dutch than it was different.

The same pattern appeared in her "discussion" of how the Japanese oppressed the Taiwanese and the subsequent recovery of Taiwan by Chiang Kai-shek. In her discussion of Japanese colonial rule, Ms. Chen emphasized only the brutality of the Japanese. With respect to the dialogue that ensued concerning the land survey initiated by the Japanese, the student only mentioned the land survey, failing (or not being given the opportunity) to indicate how the survey was related to Japanese exploitation of the properties of Taiwanese landowners. Ms. Chen jumped in -- cutting the student short -- and claimed that the survey was used by the Japanese rulers for the purpose of confiscating Taiwanese land. As a matter of fact, the land survey was completed in 1904 as a part of a land reform policy that actually benefited small farmers. By implementing land reform, the Japanese rulers introduced the legal protection of private property that was owned by tenant farmers and established a land tax system under which citizens who owned lands were obligated to pay taxes (Gold, 1986, p. 37). It appears that Ms. Chen knew little or nothing about the land survey or the land reform; she automatically assumed that any policy implemented by the Japanese rulers was intended to oppress the Taiwanese people. With respect to other policies implemented by the Japanese, Ms. Chen failed to mention



that Japanese rule transformed Taiwan into a modern society with competitive industries and an elaborate transportation system.

During her discussion of the recovery of Taiwan, Ms. Chen portrayed Chiang Kai-shek as a great man, a hero who recovered Taiwan and rescued the Taiwanese people from the oppressive Japanese colonial rule. She explained why -- according to her -- the ROC government recovered Taiwan by referring to Chiang Kai-shek: "Chiang Kai-shek took pity on the Taiwanese people who were suffering at the hands of the Japanese oppressors, and, therefore, he decided to recover Taiwan." Hughes (1997) offers an alternative explanation. According to him, in Chiang Kai-shek's book, China's Destiny, Chiang asserted that Taiwan was crucial for China's national security. According to Hughes, this was the primary reason why, in October 1942, China formally proclaimed its right to recover Taiwan.

It appears that both Ms. Chen's political orientation and her knowledge of the subject matter played important roles in shaping the way in which she taught Taiwan history. In her eyes, Taiwan's history is a rich subject matter that offers great potential for helping students develop a sense of Chinese identity. She transmits two primary messages to students: China is the ancestral home of the Taiwanese people (including aborigines) and two great men, Cheng Cheng-kung and Chiang Kai-shek, rescued the Taiwanese from the oppression of foreign, colonial rule. These are the standard, ideologically-motivated interpretations of history that are used by Chinese nationalists who want to claim that Taiwan is an integral part of China (Dai, 1993; Weng et al., 1992).

As we learned in the last chapter, Ms. Chen's understanding of Taiwan history is

closely related to traditional school materials that represented the KMT's perspective on Taiwan history. In these three vignettes, the content of her instruction is very similar to that of the traditional model. She never criticizes the textbook and she faithfully transmits the standard lines to students by using the textbook as the main resource for classroom discussions. Moreover, she even inserts outdated material -- for example, that the aborigines had Chinese ancestors -- even when the new textbook authors had deleted such references.

Researchers suggest that "when teachers possess inaccurate information or conceive knowledge in narrow ways, they may pass on these ideas to their students" (Ball & McDiarmid, 1990, p. 438). This appears to be the case with Ms. Chen. Her limited knowledge of the subject matter appears to have a considerable impact on her teaching. She does not know much about Taiwanese aboriginal tribes, and when her students learn about Taiwanese aboriginal tribes, they receive inaccurate or outdated information, such as the suggestion that Taiwanese aboriginal tribes also came from China. By blindly following the textbook, Ms. Chen provides students with a very limited understanding of aboriginal tribes, limited, for example, to reviewing pictures of tribal dancing and ritual ceremonies as illustrated in the textbook. Her limited knowledge about the period of Japanese rule also influences her ability to effectively instruct the students in an unbiased fashion, emphasizing Japanese oppression, for example, without any discussion of the ways in which Japanese policies benefited the island. Clearly, her own reading of Taiwan's history has been highly selective and ideologically motivated -- and she passes that on to her students.

Grossman and her colleagues (1989) suggest that teachers who lack knowledge of

their subject matter are unlikely to challenge textbooks. Moreover, they rely more heavily on textbooks than do teachers who are better informed concerning the subject matter. Such is the case with Ms. Chen. During my observations, she never once criticized the textbook, faithfully transmitting its content. What Ms. Chen teaches is a direct reflection of what she knows and does not know.

Ms. Chen claims that she has adopted a “constructivist approach” to teaching social studies by asking students to collect information independently and asking them questions based on their findings. The information she asks students to collect, however, is only factual knowledge provided by Taiwan history texts. She frequently asks questions to test students’ mastery of these traditional interpretations. Ms. Chen even admits that the principal purpose of asking students questions is to facilitate their memorization of the textbook. Ms. Chen believes that her constructivist activities can help students to become more active learners, finding information on their own and seeking answers to questions asked in class.

But Ms. Chen’s view of constructivist teaching is quite different from that of the educational professionals who formulated the pedagogical philosophy. Theoretically, constructivist teaching helps students to internalize information, transforming and synthesizing it in novel ways. This approach is quite different from the traditional teaching style that merely encourages students to repeat and recite textbook information. Teachers who adopt a constructivist approach, as theorists argue, act “as mediators of students and environments, not simply as givers of information and managers of behavior” (Brook & Brook, 1993, p. 102). Banks (1995) argues that, in constructivist social studies classrooms, students need to understand how knowledge itself is

constructed. Cornbleth (1982) suggests that:

Students are encouraged to pursue their own interests, engage in a variety of activities, and examine a broad range of political content and activities. Constructive citizenship education assumes that knowledge is tentative, that there are multiple ways of learning and knowing, and that different perspectives ought to be considered. (p. 261)

Clearly, these ideas conflict with Ms. Chen's interpretation of constructivism.

Ms. Chen sees her teaching as constructivist simply because she often asks questions.

Looking closely at the dialogue between Ms. Chen and her students, one finds that the questions serve two purposes. Her questions allow her to test students' understanding of factual information. Her questions do not encourage students to go beyond the textbook, to develop their own understanding of events, or to challenge other students' (or the teacher's) misconceptions. "What were Cheng Cheng-kung's policies for the development of Taiwan? How did the Dutch administrate Taiwan? What are the names of two forts that were established by the Dutch?" These questions are neither intellectually demanding, nor are they particularly helpful for generating critical thinking on the part of the students. By asking only these kinds of questions, Ms. Chen continues to dominate classroom discussions and the textbook remains at center stage.

Ms. Chen's questions serve the important function of allowing her to direct, control, or channel the "discussion." For instance, when Ms. Chen asked students to imagine what the geographical features of Taiwan were like in ancient times, her intention was to lead students to suggest that Taiwan was originally connected to the Chinese mainland. When students suggested instead that the island of Taiwan had been beneath the sea and that there had been volcanic explosions, Ms. Chen chose not to respond to these suggestions at all, because they deviated from her predetermined path.

These suggestions did not appear to fit into the discourse she had intended to develop. When another student suggested that Taiwan had probably been connected to Japan at some point, Ms. Chen redirected the remark so as to bolster her own pet theory that Taiwan had been originally connected to the mainland.

On the surface, Ms. Chen appears to permit dialogue. She asked the student who asserted that her ancestral home was Taiwan to explain why she held this opinion. However, Ms. Chen then redirected the students in a heavy-handed way to confirm that their ancestral home is in China, giving them little opportunity to express their own opinions. She was attempting to create a “public opinion,” a traditional consensus. Kelly (1986), explains how this strategy works:

This position is characterized by a deliberate attempt to induce students into accepting as correct and preferable a particular position on a controversial issue through means which consciously or unconsciously preclude an adequate presentation of competing points of view. In the more authoritarian forms of exclusive partiality, teachers assert or assume the correctness of a particular point of view while competing perspectives are ignored, summarily dismissed, or punitively downgraded . . . . These tactics might include selecting the most articulate of esteemed students to represent the preferred position in a debate. (pp. 116-117)

In the discussion of ancestral origins, Ms. Chen appeared on the surface to ask students questions and to allow them to express their own views. However, she consistently shaped the discussion in ways that moved away from or excluded opinions that do not mesh with her teaching objective (recall the collective dismissal of the boy’s suggestion that all of our ancestors came from Africa). Even though she dons the mantle of constructivism, Ms. Chen’s teaching remains predominantly authoritarian, limited to the official, traditional (and heavily ideologically-biased) treatment of historical reality.

### Ms. Hu

Before learning about this section, my little friends originally identified themselves as Taiwanese. When they learned that their ancestors migrated from the mainland to Taiwan, they realized their Chinese roots, that they were Chinese too. I want them to learn that Taiwanese are *jung-guor rern* (citizens of the Chinese nation-state). The subject matter of the section on mainland ancestral roots is effective for teaching children this concept. (Hu, I # 1, 9/6/97)

Ms. Hu regards social studies as an important school subject. She wants to connect social studies to students' daily lives. With respect to her purposes for teaching social studies, Ms. Hu explained that she wants "to cultivate good citizens." But what are good citizens in her mind? Responding to this question, she explained that in order to maintain an orderly and harmonious society, the most important quality of good citizen is "obedience to the law" (Hu, I# 1, 9/6/97).

Asked why students needed to learn about Taiwan history, Ms. Hu explained:

They live in Taiwan and it is their obligation to know about the history of Taiwan. By learning Taiwan's history, they feel a connection between their lives and this island. (Hu, I # 1, 9/6/97)

In addition to cultivating a feeling of connection with Taiwan, Ms. Hu also stressed that it is imperative to cultivate a sense of connection between Taiwan and the mainland. She uses the metaphor *shyueh-moh shiang-liarn* (members in a family are connected by blood) to describe the connection between Taiwan and China. Ms. Hu worries that, due to the 50-year separation of Taiwan from its motherland, younger generations are becoming indifferent to Chinese unification. She hopes that, through learning about Taiwan history, students will better understand the connection between Taiwan and the mainland. In turn, she wants them to yearn for reunification of Taiwan. As a teacher, she feels that it is her responsibility to teach students that people on Taiwan

share a common lineage with the mainland Chinese:

There is a blood relationship between us because we are all *Jung-guor rern*. It is a historical fact that our ancestors came from *da-lu*. In my family, my father's siblings and relatives all live on the mainland. The separation of the past four decades between the two sides of the Taiwan Strait has not cut off my father's connection to his siblings. The older generation maintains this blood connection well. Despite the fact that they left their homeland fifty years ago, they have never forgotten that the mainland is their home. My father and his biological siblings are looking forward to reunification between Taiwan and the mainland. However, the generation that retreated to Taiwan in 1949 is getting older. I worry that the existing connection maintained by the older generation will be lost after their death and that new generations, born in Taiwan, will gradually lose this strong attachment to the mainland. As a teacher, I have a responsibility to teach children the fact that we (the people on Taiwan) are connected with the Chinese on the mainland by flesh and blood. I hope that when students study Taiwan's history and learn the historical fact that we came from the mainland, they will say to themselves: "Yes, we (Taiwan and the mainland) should be the same country." (Hu, I # 1, 9/6/97)

Although Ms. Hu suggested that cultivating students' love of Taiwan was one of her purposes for teaching Taiwan history, in her actions, she paid more attention to teaching students about the connection between Taiwan and China. When asked how she emphasized the connection between Taiwan and China through the teaching Taiwan history, Ms. Hu mentioned two topics that she saw as especially significant. The first topic concerned the textbook section: "Our Ancestors Came from the Mainland." Her experience of teaching this section in previous years had led her to believe that this section helped correct students' mistaken ideas about their ancestral home, as well as contributing to the cultivation of their Chinese identity.

Ms. Hu believes that students need to know why the ROC government retreated to Taiwan in 1949. She sees this event as key to helping students remember that, "the KMT government's origin was on the mainland and the ROC regime represents China" (Hu, I# 1, 9/6/97). She explained why it is so important for students to learn about the retreat of

the ROC to Taiwan:

They (the students) were born and grew up on the island of Taiwan. They think that Taiwan is their country and *da-lu* (the mainland) is a foreign land. They are not concerned with the great mission of Chinese unification between Taiwan and the mainland. They believe that Taiwan is a country, not a part of China. When they learn the historical fact that the ROC was originally established on the mainland and then retreated to Taiwan in 1949, they realize that our country, the ROC, had ruled the mainland and, thus, we have to return to the mainland. It is a historical fact that the two areas were originally the same country. But why are we (the ROC) on Taiwan and why is the PRC on the mainland? Why is China divided into two areas? Students need to learn about the civil war so that they never forget that the ROC is the legitimate representative of China. (Hu, I # 1, 9/16/1997)

Ms. Hu does not recognize that she is teaching national identity. Like Ms. Chen, she assumes that her stance in teaching Taiwan history is “objective” and “neutral,” based on the teaching of historical “facts”:

The stance of the teacher concerning national identity should be objective and neutral. For teachers, it is not appropriate to influence students’ sense of national identity. I do not think my teaching of Taiwan history is meant to influence students’ sense of national identity. As a teacher, I should tell students the fact that our ancestors migrated from the mainland. This is a historical fact. Students need to be aware of this historical fact so that they can make an informed decision about the future of Taiwan when they grow up. (Hu, I # 1, 9/6/97)

There are 33 students in Ms. Hu’s social studies class. Her students also come mainly from the middle class; their parents are public servants, teachers, university professors, doctors, and managers of public and private businesses. The parents have high expectations for their children’s academic performance and pay a great deal of attention to their children’s test scores.

Ms. Hu’s students are divided into six groups, sitting around six big desks. Ms. Hu stands at the front of the classroom so that she can use the large chalkboard and nearby overhead projector. Most of the time, students listen to her; they never work



together in groups. Students are orderly and quiet, following the rules and procedures established by Ms. Hu. For instance, students are required to enter the classroom on time. When Ms. Hu asks students questions, they raise their hands, waiting to be called on.

Ms. Hu relies heavily on the textbook. She refers to her pedagogical practice as “traditional” (Hu, Post-I # 4, 12/19/97). By adopting a textbook-centered approach, Ms. Hu not only thoroughly covers the textbook but focuses her efforts on the students’ mastery of mundane and disconnected facts -- as they are presented in the textbook. Her typical procedure for teaching a social studies lesson includes four steps: First, she spends 10 to 20 minutes lecturing, sometimes asking one or two questions regarding textbook content. Second, she assigns individual students to read paragraphs. When an individual student reads out loud from the textbook, the rest of the class follows along silently. After finishing the whole lesson, Ms. Hu points out the key information and asks students to underline those facts in their textbook. Finally, to make students more familiar with key information, Ms. Hu uses the overhead projector to again present what she considers to be the important information that students need to memorize.

Ms. Hu believes that this textbook-centered approach meets the needs of students as well as the expectations of parents. In her eyes, fourth graders are not able to grasp the important information presented in the textbook. She believes that, as a teacher, it is her responsibility to help students to focus on the important textbook information because quizzes and tests use the textbook as a primary resource for student evaluation. The parents’ attitude towards the textbook as a primary resource for class lectures also influences Ms. Hu:

In previous school years, I did not direct students to read the textbook and I did

not ask students to underline information in the textbook. Some parents complained to the homeroom teacher that I did not help students underline important information in the textbook. The parents did not feel satisfied with my teaching because they thought that I did not adequately prepare students to use the textbook to prepare for tests. From then on, in order to meet parents' expectation, I have students highlight key points in the textbook. I closely monitor the students' performance, checking each student's textbook to see whether he or she has actually underlined the key points. I tell students that most of the points that I highlight will appear on the tests. Students are motivated to recite the important information that I highlight for them. (Hu, Post-I # 4, 12/19/97)

I present four vignettes of classroom practice to demonstrate the content and style in Ms. Hu's teaching of social studies.

**Vignette One: Our Ancestors Came from *da-lu* (the Mainland)**

During the previous class, students were required to do the textbook assignment that entailed questioning their parents about their birthplaces and their ancestral homes. Ms. Hu began this class by checking students' assignments. She asked students to raise their hands to denote their birthplaces, writing a list on the board. This happened very quickly. Before asking the second question about ancestral origin, Ms. Hu told the students that the population of Taiwan was composed of two ethnic groups: Chinese Han and Taiwanese aboriginal tribes. Ms. Hu then asked students where the Han people came from. Students responded in unison that the Han people came from *da-lu*. Nodding in ascent, Ms. Hu explained that the Chinese Han people who came from *da-lu* are the ancestors of the Taiwanese people.

She then asked the second homework question. This time, Ms. Hu directed students to stand up when their ancestral provinces were named. Ms. Hu started with the Fukien Province. Nineteen students stood up. Four students stood up when she named the Kwangtung Province. When Ms. Hu asked students about the Taiwan Province, six

students stood up. Ms. Hu asked the four remaining students to report on their ancestral homes, and they reported that their grandparents came from Jiang-si, Jeh-jiang, Hu-bei, and Hu-narn. Ms. Hu wrote the provinces on the board and the number of students who identified which each. But she did not include the Taiwan province in the list of ancestral homes, asking the whole class whether or not the Taiwan province could be considered to be an ancestral home:

T: At the beginning of this class, I told you that the residents of Taiwan are composed of Taiwanese aboriginal tribes and Chinese Han people. In your class, 6 little friends filled out the survey that their ancestors came from the Taiwan province. Why?

S: Because they are Taiwanese aboriginal tribes.

The class erupted in laughter.

T: Are they Taiwanese aboriginal tribes?

Ms. Hu pointed to a student who claimed that her ancestral home was Taiwan Province, asking her whether or not her family was related to Taiwanese aborigines. The girl shook her head, "No." Ms. Hu then explained to the whole class why the six students confused:

T: Many Taiwanese people's ancestors migrated to Taiwan 300 years ago. Some Taiwanese families have not maintained their family history concerning their ancestral home from generation to generation. These six little friends' families probably are some of those families that do not seriously keep track of their genealogical table of clans. So these six little friends do not exactly know which province on the mainland their ancestors came from. The six little friends should take this assignment seriously and ask your parents again. In the next class, I would like to check again about their ancestral homes. I believe that the six little friends' ancestral homes are in certain provinces on *da-lu*, but definitely not Taiwan Province. Let's look at the data concerning ancestral homes. Which provinces are the principal provinces where our ancestors came from?

Ss: Fukien and Kwangtung.

Ms. Hu called on the class leader, asking the leader to draw a set of bar graphs that portrayed the distributions of students' ancestral homes on the mainland.<sup>8</sup> Ms. Hu then explained that when all four of her classes present the survey data in bar graphs, the distribution of ancestral homes on the mainland would become clearer, showing that the majority of the Taiwanese population as descendants of Chinese settlers who came from Fukien and Kwangtung.

Ms. Hu then guided her students to locate students' ancestral homes on the mainland, using a map of the ROC. She hung two maps on hooks on the chalkboard: One is the map of the ROC and another is the map of the PRC.<sup>9</sup> Pointing to the map of the ROC, Ms. Hu started by asking students what it was a map of. Students responded to Ms. Hu in chorus that it is the map of the ROC. Pointing at the map of the PRC, Ms. Hu told students that "their map is different from our map in some respects":

T: This is a map made by *da-lu*. There are differences between our map and their map. On our map, we have 35 provinces and Mongolia is still included as part of our territory. On the map made by *da-lu*, they (the PRC) have made many changes. They reduced the number of provinces and excluded Mongolia. Therefore, as you can see, the shape of their map is like a hen but the shape of our national territory is beautiful, like a leaf of begonia.

Ms. Hu then asked students to point out the location of the Fukien Province and the other provinces that students suggested were their ancestral homes. After studying the

---

<sup>8</sup> From elementary through high school, each class has a class leader. The class leader is elected by the whole class, on the basis of intelligence and the ability of work hard. When the teacher enters the classroom, the class leader tells the whole class to "stand up" and bows to the teacher. In addition, the class leader helps the teacher, collecting homework, maintaining class order when the teacher is not in the classroom, and helping with anything teachers ask them to do.

<sup>9</sup> Ms. Hu borrowed the map of the PRC from her colleague, Ms. Huang, who traveled around China and returned with a map of the PRC. In Taiwan's bookstores, people do not sell such maps.

map, Ms. Hu then called on several students to read from the textbook. After finishing the reading for the lesson, Ms. Hu read from the textbook again, highlighting important information. Following her instructions, students also highlighted that information in their textbooks.

For the rest of the class, Ms. Hu concentrated on a textbook map of Chinese migration routes. This map illustrated a variety of migration routes from China to Taiwan that were used from the Ming to the Ching dynasties. Ms. Hu showed students how to use the map. First, she asked students to circle in red the locations of Chinese settlers' homelands in the Fukien and Kwangtung provinces. Then she asked them to circle the new cities on Taiwan that were founded by Chinese settlers. Finally, students were required to draw lines on the map to connect the ancestral homes on the mainland to their new homes in Taiwan.

**Vignette Two: Two historical figures -- Liu Ming-chuarn and Wu-sha**

Ms. Hu began class by presenting a set of transparencies on the overhead projector:

Why was Liu Ming-chuarn assigned to Taiwan?

- (1) For the China-French war
- (2) To be the first Taiwan governor.

What was Liu's contribution to the development of Taiwan?

- (1) building railroads
- (2) building gun emplacement
- (3) building telegraph office and post office
- (4) providing electric light

Outcome: Making Taiwan the most advanced province of China.

Ms. Hu continued to help students to review the section on the administration of the Ching dynasty by underlining the most important information in the textbook. She asked one student to read a paragraph. Afterwards, students listened to Ms. Hu and underlined important information: In 1884, the Ching dynasty was involved in a war with the French and they fought in Vietnam and Liu Ming-churan was assigned to Taiwan to resist the French.

In the previous class, students had studied a section about Chinese settlers and Ms. Hu had asked students to collect information about a particular Chinese settler, Wu-sha. One student brought in a one-page story about Wu-sha, which Ms. Hu distributed to all of the students in the class. Ms. Hu asked the student who brought the story to read it out loud for the class. Afterwards, she tested students' retention of the story's details, asking them to cover up their copy and respond to her questions: "What was the old name of today's I-lan county? What province did Wu-sha come from? Who followed Wu-sha to I-lan? Why were Chinese settlers fearful to open up I-lan?"

S: Because aboriginal tribes occupied I-lan and they were ferocious, fighting with the Han people.

S: Because the aboriginal tribes were barbarians, they had the custom of cutting

off the heads of the Han people for religious ceremonies. Therefore, the Han people did not dare go to I-lan.

T: Very good. When the Chinese Han people migrated to Taiwan, Taiwanese aboriginal tribes did not get along well with the Han people. Aboriginal tribes killed many Han people. In order to save the Chinese Han people, Wu-sha managed to make friends with aboriginal tribes by trading goods with aborigines. What did he sell to aboriginal tribes?

Ss: Clothes.

T: Yes. By trading with aborigines, Wu-sha made friends with them. What was the most important event that allowed the Han people to open up the I-lan area? Number 35, do you know about that event?

S: Aborigines suffered a strange epidemic and many of them died. Wu-sha was familiar with Chinese herbal medicine and he voluntarily cured them.

T: Good. All of you learn this story of Wu-sha. Keep this copy. I will test you again next time.

Before beginning the next section of the textbook on Japanese colonial rule, Ms. Hu reviewed the previous section on Ching rule. Ms. Hu wanted the students to highlight the “fact” that Liu Ming-chuarn turned Taiwan into an advanced province:

T: Who was assigned by the Ching emperor to be the governor of Taiwan?

Ss: Liu Ming-chuarn.

T: Right. Liu Ming-chuarn ruled Taiwan for 6 years. He changed Taiwan. Due to his efforts, Taiwan became the most advanced province in China. At that time, the Taiwanese *turng-bau* (siblings) were the happiest people in the world, enjoying a very prosperous life. However, unfortunately, in 1894, what event changed Taiwan’s fortune?

Ss: The War of Jiah-wu.<sup>10</sup>

---

<sup>10</sup> The year of Jiah-wu on the Chinese calendar corresponds to 1894 on the Western calendar.

### **Vignette Three: Japanese Rule**

Ms. Hu began the class by asking students to read from the textbook section concerning Japanese rule. She then asked students to highlight the important information. After that, Ms. Hu wanted students to examine two photographs in the textbook, one of a school and the other of a sugar refinery. She then used the photographs to explain how the Japanese brutally oppressed the Taiwanese people.

T: Take a look at the photograph on the bottom of page 75. It is a school that was established by the Japanese. When you look at this photograph, you may think that the Japanese treated the Taiwanese well. But do you know why they established schools for the Taiwanese?

S: Because they intended to educate the Taiwanese to become Japanese.

T: Right. The purpose of educating Taiwanese children was to make them Japanese. Japanese rulers did not really want to make Taiwanese people knowledgeable. They wanted to make Taiwanese *turng-bau* (biological siblings) obedient. The Japanese conducted a Japanization movement to make Taiwanese “the people of the Japanese imperial emperor.” Your grandparents, under Japanese rule, were forced to change their Chinese names into Japanese names and to speak Japanese. Their teachers only taught Japanese history; Taiwanese children were not allowed to study Taiwan’s history. The purpose of educating Taiwanese students was to eliminate Chinese nationalism. With this kind of schooling, it is no wonder that Taiwanese children forgot that they were Chinese; they identified themselves as Japanese and respected the Japanese rulers. Thus, Taiwan *turng-bau* did not resist Japanese rule for 50 years. However, the Japanese did not succeed. Some Taiwanese *turng-bau* still maintained their Chinese identity and some Taiwanese parents taught their children Chinese characters at home and told their children never to forget that they were Chinese.

Then, Ms. Hu pointed to the photograph of a sugar refinery, explaining how the Japanese had exploited Taiwan’s natural and human resources:

Please look at the photograph on page 76, which is of a sugar refinery. Did the Japanese really want to help Taiwan develop its industry and intend to make the life of the Taiwanese people better? Read the textbook and highlight the key information, “tea, rice, sugar, camphor were shipped to Japanese islands. The Japanese exploited our nature resources and human labors.” The Taiwanese



people could not enjoy the harvests they produced because the Japanese shipped the agricultural products to Japan. Taiwan was a kingdom rich with rice but many Taiwanese people starved during Japanese rule. Politically speaking, the Taiwanese people did not enjoy freedom of speech; Japanese police controlled all Taiwanese people. This suffering and oppression led brave Taiwanese people to participate in many armed resistance movements against Japanese rule. Let's read the textbook.

#### **Vignette Four: The Anti-Japanese War and the Recovery of Taiwan:**

For this class, Ms. Hu covered the last section in the textbook dealing with the recovery of Taiwan. In addition, she added the retreat of the KMT government from the mainland to Taiwan in 1949. Ms. Hu lectured and students listened quietly. She began with the Anti-Japanese War, telling students that the war started in 1937 and ended in 1945. She asked students how many years the war lasted. "Eight years," they responded. Ms. Hu continued by telling the students how brutal the Japanese invaders were. During the war, many innocent Chinese were killed and Chinese women raped. She also mentioned that the United States joined in the Pacific Ocean War, finally ending the war with two atomic bombings:

The turning point of the war came with the involvement of the United States after the Pearl Harbor incident. Eventually, the United States dropped two atomic bombs on Japan. Consequently, the Japanese surrendered to us. During the war, we survived by confirming our Chinese nationalism and never gave up resisting the Japanese. During the war, our president, Chiang Kai-shek, decided to save the Taiwanese people. When the Japanese surrendered to us, our president, Chiang Kai-shek, repaying ingratitude with kindness, did not request that Japan pay any indemnity for the war except for returning Taiwan and the Pescadores. Then, Taiwan was allowed to return to its mother country.

For the rest of the class, Ms. Hu discussed the retreat of the ROC government to Taiwan, which was not included in the textbook. She started with the civil war, explaining that it was a political power struggle between two parties, the Kuomintang (KMT) and the Chinese Communist Party, explaining how the two parties held different

ideologies, the Chinese Communists advocated Communism and the KMT advocated democracy. She went on to explain how the CCP wanted to replace the KMT as the ruling party. The situation was much like today's DPP, who also wish to compete with the KMT in order to become the ruling party in Taiwan.

Ms. Hu emphasized the idea that "the majority at that time supported the KMT."

But why was the KMT defeated by the CCP? Ms. Hu explained:

During the Anti-Japanese War, the KMT troops fought with Japan to guard our country, so the KMT army was exhausted. Conversely, the Chinese Communist Party took advantage of the war, secretly expanding its power to rural areas and conserving their strength and storing up energy during the war. Moreover, when Japan surrendered to us, the Chinese Communists took over the Japanese military's weapons.

But why did the KMT reject the CCP when it wanted to share political power? Ms. Hu described the Chinese Communist Party as "vicious, breaking the social order, and secretly forming the red army," while the KMT was a political party that "advised the CCP to be responsible to the Chinese people and to make China a strong country." Ms.

Hu also indicated that the CCP was the instigator of the civil war:

The KMT tried to negotiate with the CCP to reach a peace agreement, but the CCP insisted on taking over the KMT and controlling the entire mainland. Inevitably, the civil war traumatized all of China. Finally, the KMT was defeated by the CCP and retreated to Taiwan in 1949.

Ms. Hu concluded this unit on Taiwanese history by telling the students why there are two Chinas:

The Communists established the People's Republic of China in *da-lu* and we moved the seat of the Republic of China to Taiwan. Today, there are two Chinas: they (the PRC) represent China and we (the ROC on Taiwan) also represent China.

### **Reading the Vignettes**

Ms. Hu wanted students to learn a lot about Taiwan history. She wanted them to learn about historical figures who contributed to the development of Taiwan, the Chinese settlers who opened up I-lan, and how Chiang Kai-shek recovered Taiwan. Like Ms. Chen, Ms. Hu insisted that students need to learn about their ancestral origins. During a discussion of the survey of students' ancestral homes, Ms. Hu denied that six students could accurately be said to have ancestors of Taiwanese origins, stressing that China was the only ancestral home for Taiwanese children. She stressed the concept of Chinese roots again in her use of the two maps -- the ROC's China and the PRC's China -- to discuss the migration routes.

When she pointed to the mainland on the map, she told students that it was "our" territory. And when she presented the PRC map to the students, she did not tell them that, currently, the PRC effectively controls the Chinese mainland or that it is the country recognized by the international community as "China." When I asked her why she presented the PRC map to the class, Ms. Hu told me that she simply wanted students to know that "there were differences between their map and our map."

Also like Ms. Chen, Ms. Hu emphasized the contributions made by the Ching officials to the development of Taiwan, stressing the negative aspects of Japanese colonial rule. Students learned about three important figures in Taiwan history: Wu-sha, Liu Ming-chuarn, and Chiang Kai-shek. It seems likely that Ms. Hu's political orientation and limited understanding of Taiwan's history have an influence on what she taught the students about these three historical figures.

Consider, for example, what she told the students about Wu-sha. As we know

from the previous chapter, Ms. Hu's understanding of Taiwanese aborigines is limited. Ms. Hu portrayed Wu-sha as a hero who led Chinese settlers in the opening up of I-lan. The story of Wu-sha is told from a Chinese Han-centered perspective, portraying Chinese settlement as an enterprise that helped develop Taiwan into a Chinese community, ignoring the fact that Chinese settlers occupied aboriginal lands by force, expelling the aborigines from their homeland. This is similar to the way in which American history textbooks (at least traditionally) fail to mention how colonists expelled native Americans from their homelands, providing U. S. school children with an ethnocentric characterization of American history (Axtell, 1987).

According to Ms. Hu, Wu-sha became a friend of the aborigines. In reality, Wu-sha fought with the aborigines over their lands. Luckily for him, many aborigines trusted Wu-sha and allowed him to raise crops in the hills near I-lan. However, more Chinese settlers joined Wu-sha, and, eventually, Wu-sha led more than a thousand Fukienese immigrants across the Ko-mo-lan Plain (present day I-lan), initiating a Chinese occupation. Two hundred armed militiamen were part of the group. In the fall of 1796, the settlers built a fortified earthen settlement in the northeastern corner of the plain, threatening the aborigines who lived in the area. The aborigines resisted and the Chinese militia suffered heavy casualties (Hsu, 1980). Wu-sha retreated to San-diao-ko.

The following year, smallpox spread among the aborigines. It is claimed that Wu sha provided free medicine and saved aboriginal lives, and that the grateful aborigines yielded part of their land to him voluntarily. But Wu-sha was not content with the lands that he had been given freely by the aborigines. Instead, he aggressively expanded into additional aboriginal territory. He and his followers established two more fortified bases

in I-lan and recruited more Chinese settlers. He then applied for and was authorized a charter of reclamation from the Taipei magistrate. Wu-sha received an official seal issued by Ching officials and he became a militia captain, organizing Chinese settlers to take more farmland from the aborigines (Hsu, 1980). In the seven decades that followed, more Han settlers moved into this area, extending Chinese “reclamation.” In the 1870s, the entire I-lan area was completely occupied by the Han settlers. As a result of this Chinese occupation, the aborigines were forced to migrate or were assimilated into the Chinese community (Hsu, 1980).

From a Chinese-centered perspective, historians often regard Wu-sha as a hero who made significant contributions to the development of I-lan as a Chinese community. But Ms. Hu did not critically examine her curriculum so as to be aware of this Chinese-centered bias; instead, she treated the traditional story of Wu-sha as an incontrovertible fact. During this class, one student described aborigines as “ferocious,” and reported that they had the custom of “cutting-off the heads of the Han people for use in worshipping their deities.” Ms. Hu agreed with the student’s stereotype (one that is common among the Han people), and did not ask students to discuss the nature of Taiwan before the advent of Chinese settlers, how Chinese settlers occupied aboriginal tribal lands by force. In the eyes of Chinese nationalists, Taiwan was already a frontier of China in the 17<sup>th</sup> century and it was due to Chinese settlers’ efforts that Taiwan became “civilized.” This assumption ignores the history of the aborigines, their culture, the pain that they suffered when forced to yield their land to the Chinese settlers, and their perspective with respect to the Chinese migrants.

Teachers who understand the interpretative nature of history could use the story of

Wu-sha to guide students in the investigation of the role that interpretation plays in the writing of history texts. However, Ms. Hu guided students only in the memorization of fragmented factual information from the official textbook, asking questions like: “What was the original name of the present day I-lan county? Where did the Chinese settlers who followed Wu-sha come from? What did Wu-sha sell to the aborigines? Which province did Wu-sha come from?”

Like Ms. Chen, Ms. Hu emphasized only the negative side of Japanese rule, omitted the historical facts concerning the industrial and agricultural development of Taiwan under Japanese administration. In the textbook, two photographs were used to demonstrate the establishment of a modern educational system as well as industrialization in Taiwan under Japanese rule. Ms. Hu interpreted these photographs as illustrative of Japanese oppression and she wanted students to believe that the Japanese made no thing good for the Taiwanese people’s lives, making no significant improvements to Taiwan. In contrast, Ms. Hu taught students to appreciate Liu Ming-chuarn, a Ching official who made Taiwan the most advanced province of China, before the advent of Japanese colonial rule.

This textbook unit on Taiwan history ends with the section dealing with the recovery of Taiwan in 1945. Ms. Hu ended the unit by providing additional information on the retreat of the KMT government to Taiwan in 1949. According to her, this episode is significant because students need to know that “the KMT government’s origin was on the mainland and the ROC regime represents China.” During this class, Ms. Hu failed to provide students with any perspective other than the KMT’s traditional interpretation of the causes of the KMT’s defeat in the civil war and its retreat to Taiwan. Instead, in

explaining the KMT's retreat to Taiwan, Ms. Hu blamed the CCP, suggesting that there was only one reason for the KMT's defeat: the KMT was exhausted after the Anti-Japanese War while the CCP had conserved its strength and stored up energy throughout the period." She told students that, during the civil war, the majority of the Chinese people supported the KMT, but the CCP, by playing games, occupied the entire mainland. The war against Japan might have contributed to the weakening of the KMT, that was not the single or primary cause for the failure of the KMT in the civil war.

In reality, historians and political scientists argue that the causes for the KMT's failure in the civil war were numerous and very complicated. One was related to the KMT's failure to rule in a virtuous fashion, thus, failing to gain support from the public (Ballantine, 1952). During KMT rule on the mainland, the government, in order to retain the support of the landowning classes who paid land taxes, the KMT favored the landlords at the cost of alienating the peasantry, who comprised four fifths of the population (Ballantine, 1952). Moreover, throughout the civil war, students and intellectuals were much more enthusiastic supporters of the CCP than the KMT government (Ballantine, 1952). Ballantine (1952) sees the lack of support and confidence on the part of the society at large as the cause for the KMT's defeat in the civil war:

It is true that the people had lost confidence in the devotion of the Nationalist government (the KMT) to their welfare and in its capacity to extricate the nation from the grave problems that beset it after eight long years of resistance to Japan. (Ballantine, 1952, p. 89)

One American general summarized his view of the causes of the KMT's defeat with the observation that: "The Communist, on the other hand, through ruthless discipline and fanatical zeal, attempted to sell themselves as guardians and liberators of

the people” (the U. S. Department of State, 1967, p. xiv). In contrast to that of the CCP, in an official report, China White Paper, made by American observers, KMT rule on the mainland was described as “discredited,” “corrupt,” and “hopeless” (Walker, 1973, p. 360). This view helps to explain why the KMT did not win the support of the public during the civil war and eventually was defeated by the CCP.

Clearly, Ms. Hu’s interpretation of the KMT’s defeat at the hands of the CCP is biased. She failed to consider any causes other than the KMT’s exhaustion -- completely neglecting to mention the rampant corruption and ineffectiveness of KMT’s policies. A letter written in the U. S. Department of State to President Truman in July of 1949 suggests other reason:

They (the reasons for the failures of the KMT government) do not stem from any inadequacy of American aid. Our military observers on the spot have reported that the Nationalists armies (the KMT) did not lose a single battle during the crucial year of 1948 through lack of arms or ammunition . . . . Its (the KMT) leaders had proved incapable of meeting the crisis confronting them, its troops had lost the will to fight, and its Government had lost popular support . . . . The Nationalists armies did not have to be defeated; they disintegrated. History has proved again and again that a regime without faith in itself and an army without morale cannot survive the test of battle (The U. S. Department of State, 1967, p. xiv).

Ms. Hu concluded this section by explaining that, due to the civil war, China separated into two Chinas: the PRC on the mainland and the ROC on Taiwan. Ms. Hu is quite clearly using a course in Taiwan’s history as a political platform for the indoctrinating a call for Chinese unification.

### **Mr. Lin**

Traditionally, the history of Taiwan represented in the textbook has been interpreted from the KMT’s perspective. Taiwan’s history, as it is represented in textbooks, portrays Taiwan as a part of China and the authors ignore Taiwan. It is no wonder that students are confused about their national identity. Above all else,



teaching Taiwan's history must help students understand that we are a multicultural society. I would like my students to appreciate this feature of Taiwanese society and develop a love for Taiwan. In my teaching of Taiwan's history, I help my students to develop a Taiwanese identity and a shared sense of common destiny among Taiwan's culturally distinct ethnic groups. (Lin, I # 2, 1/18/97)

Mr. Lin considers preparation for citizenship to be the most important goal of teaching social studies. But his view of a citizen is different from that of Ms. Hu, who emphasizes that citizens should obey laws. Instead, Mr. Lin believes that citizens in a democratic society should appreciate the value of democracy, respect others' opinions, actively participate in politics, and critically supervise the government.

For Mr. Lin, there are two primary purposes for teaching the history of Taiwan. The first purpose involves helping students understand Taiwan's diverse cultures and ethnic groups. He believes that through learning about Taiwan's history, the entire population of Taiwan, with different cultures and from different provincial origins can develop a sense of a shared common destiny. His second purpose entails cultivating a Taiwanese identity in students.

He is well aware of the way in which a Chinese-centered perspective has dominated textbooks. Mr. Lin indicated that the ruling party has traditionally used textbooks as a means to transmit its political ideology to the young, and that this has been particularly true of social studies textbooks. He claims that the textbooks have served to confuse students concerning their national identity. As a teacher, he feels that it is his responsibility to teach students a sense of Taiwanese identity and "to help students become immunized against the contamination of official information contained in the textbooks" (Lin I # 2, 9/18/97).

In contrast to Ms. Hu's and Ms. Chen's view of the teacher's role as ideologically "neutral," Mr. Lin argues that it is impossible for teachers to maintain a neutral ideological stance in their teaching. Rather, he believes that teaching inevitably involves the teacher's personal preferences. Mr. Lin admits that he wants to use his teaching of Taiwan's history to influence his students and their parents. He regards himself as an agent of social reform. When asked if parents who held different views of national identity protested when he taught students a "wrong concept of identity," Mr. Lin said:

I believe that the sense of Taiwanese identity is defensible. In my history class, I teach students authentic historical facts. In the case of parents who do not agree with my point of view, I invite them to come to my office and I explain to them why we need to cultivate a Taiwanese identity among children (Lin, Post-I # 1, 12/4/97).

There are 42 students in Mr. Lin's social studies class. Students sit in seven rows of desks that stretch from the front to the back of the room. All students face the teacher who stands in front of the chalkboard at the front of the classroom.

Students are grouped together based on their scores on periodic examinations. The homeroom teacher told me that students who had better academic performance were assigned to sit in the first two rows of seats and that students with the lowest level of performance were seated in the last two rows. The homeroom teacher believes that this arrangement enhances student improvement and helps teachers to more easily maintain classroom control.

Most of the students' parents are laborers. Some of them are public servants, elementary and middle-school teachers, and policemen. The homeroom teacher complains that not all parents are interested in their children's education, both in school

and at home. Some students do not keep quiet in class and do not do their homework at home. The homeroom teacher said that when students do not finish homework at home, she sends notes to parents or makes phone calls to the home.

Mr. Lin meets with his class for three 40-minute periods each week. He believes that lecturing is the most effective approach to teaching fourth graders about history. Fourth graders are not familiar with much basic knowledge concerning history, he believes, and, therefore, for him, teaching involves telling them about complicated historical events and political figures:

Fourth graders are too young to develop their own ideas. I do not think it is appropriate to conduct group discussions or debates because my fourth graders do not have sufficient basic knowledge to use in discussions or debates. By lecturing, I give them factual information. At this stage, students need to learn and memorize factual information so that when they study in the upper grades, they will be able to develop their own ideas, make their own judgments, and join in discussions (Lin, I # 5, 1/21/98).

Mr. Lin reports that he uses a different approach when teaching his sixth graders, including debates and group discussions. He is also concerned about covering the subject matter, and he gives this a high priority. He feels under pressure with respect to time, and he believes that lecturing is the most practical and effective way to cover the textbook material:

I am aware of a variety of instructional practices, such as role-playing, debates, or discussions. However, these kinds of teaching activities take much more time than lectures and students do not necessarily learn basic information in those activities. Most importantly, I have to cover the textbook in a scheduled time frame. You might suggest that a field trip would be an effective teaching activity. However, it is not practical for a social studies class. Social studies classes are scheduled for three separate 40-minute periods in three days a week. It is impossible for me to take my students out of the classroom to visit historical sites in a 40-minute period. (Lin, I # 5, 1/21/98)

Mr. Lin explains to his students the way in which Taiwan's history, as presented

in the textbook, represents a Chinese-centered history. He goes on to tell students a newer version of Taiwan's history, from a Taiwanese-centered perspective. His lecture includes explanations, descriptions, criticisms, analogies, and examples. During my observations, I often saw him concentrating on the content and ignoring student reactions. For instance, students often raised their hands or directly called on Mr. Lin, hoping to stop him so as to clarify a point that they were confused about. But Mr. Lin seldom stopped lecturing. At the beginning of each class, students kept quiet, but near the end of class, some students appeared bored and began chatting with one another. Sometimes, Mr. Lin would stop and warn noisy students to be quiet.

### **Vignette One: The Map**

Mr. Lin started the unit on Taiwan history with two topics which are not in the textbook. The first was concerned with how students described the geographical location of Taiwan. The second was concerned with the prehistory of Taiwan. During this class, Mr. Lin departed from his lecture-only style and asked students questions. He brought in handouts for the students as supplementary materials.

Mr. Lin started the class by asking students questions about the location of Taiwan. Using the map of the ROC to illustrate the location of Taiwan, he challenged the textbook concerning the false message represented by the official map. However, students appeared confused about the national territory of the ROC. They believed that their country is China and that the mainland is part of the territory of the ROC. Mr. Lin made every effort to clarify students' understanding of the ROC's boundaries. He wants students to distinguish Taiwan from China and not to identify China as "our country":

T: Traditionally, the textbook authors describe the location of Taiwan in such a

way that Taiwan is located off the southeastern coast of our country. Is this statement correct?

Ss: Correct!

T: No! This statement is not correct. Is our country China?

Ss: Yes! Our country is China.

Mr. Lin asked students to take a look at the map of the Republic of China. He specifically pointed to the Chinese mainland, asking students what country it was. In Taiwan, the government mandates the use of the map of the national territory of the ROC and all of the ROC maps sold in bookstores label the Chinese mainland as ROC territory. Reading the heading of the map, all of the students read out loud: “The Republic of China.” Some students said that it was *da-lu* (the mainland).<sup>11</sup> Mr. Lin asked students to carefully study the map and to think about whether there is anything wrong with the map. Students responded by telling Mr. Lin that there is nothing wrong with the map. Mr. Lin jumped in:

Look at this map. On the map, the territory of the ROC covers the Chinese mainland and Taiwan. This is not a correct description of our country’s territory. Taiwan and the Chinese mainland do not belong to the same country. Let me tell you the truth. Look at this area (pointing at the area of the Chinese mainland on the map, which is labeled as the Republic of China on the map). If you study a world map that is issued by any foreign country, you will find that this area is not the territory of the ROC; instead, it is labeled as the territory of the PRC. Our government does not tell us the truth, that the international community does not recognize the Chinese mainland as belonging to the ROC. Is it correct that the territory of the ROC is composed of both Taiwan and the Chinese mainland? Tell me, what do you think about this question?

Mr. Lin then sought to test whether or not the students understood his explanation.

---

<sup>11</sup> Having been exclusively exposed to the government’s media and textbooks, students often use the geographical term *da-lu* to refer the PRC.

He called on a student to answer his question, and the student said that he did not know whether the ROC territory is composed of Taiwan and the Chinese mainland or not. Mr. Lin continued:

As a matter of fact, the territory of the ROC that is represented on the map actually belongs to three countries. (He points to the map). Here is the People's Republic of China, which is what you call *da-lu*. Here is the Republic of Mongolia and the island of Taiwan, which is the Republic of China on Taiwan. Obviously, this map does not provide us with accurate information.

Listening to Mr. Lin's explanation, several students were still confused. One student challenged Mr. Lin:

S: Is it true that the mainland does not belong to us? If the mainland does not belong to us, what should our country be? The textbook says that our country is China and *da-lu* belongs to us.

T: *Da-lu* does not belong to us. *Da-lu* belongs to the PRC. The PRC is not our country. Do you think that the United States is your country?

S: No. The United States, of course, is not my country.

T: Right. The United States is not your country because you do not live in the United States and you are not a citizen of the United States. Similarly, you do not live on the mainland and you are not a citizen of the PRC. Why do you identify China as your country? In fact, our country is Taiwan. (He points to the island of Taiwan on the map.) Here is our country, including Taiwan, Pescadores, Kinmarn, Mastu, and some smaller islands. Taiwan is small but it is a sovereign state, an independent country.

Mr. Lin then asked students how they would describe the geographical location of Taiwan. A student responded: "Taiwan is located off the southeastern coast of *da-lu*." Another student said: "Taiwan is an island located in the Pacific Ocean." Mr. Lin commented that the latter was not specific, while the former was influenced by a Chinese-centered point of view. He wanted the students to develop an alternative view:

When people are standing in China, they describe the location of Taiwan from their perspective as "an island located off the southeastern coast of *da-lu*." I

would like you to describe Taiwan from your standpoint. A little friend suggests that, “Taiwan is an island in the Pacific Ocean.” This statement is better than the one provided by the textbook. Nevertheless, we need to be more specific about the location of Taiwan.

Mr. Lin asked students to take a look at the map and to find the Tropic of Cancer.

He then told students that if they moved their finger along the Tropic of Cancer to the Pacific Ocean, they could easily find the island of Taiwan:

The Pacific Ocean and the Tropic of Cancer are two basic elements that you need to provide in a statement of the location of Taiwan. When you introduce Taiwan to people, you should say that, “Taiwan is an island straddling the Tropic of Cancer in the western Pacific Ocean.”

Mr. Lin then gave each row of students a globe. Students automatically moved to the first seat of each row. Students were given about three minutes to work together to find Taiwan on the globe. When the students had finished, Mr. Lin passed out a handout on which there were various descriptions of Taiwan’s location. Mr. Lin read the handout to the students and then handed out another one that included a chronological table of the prehistory of Taiwan. Mr. Lin then asked:

T: This material is about the prehistory of Taiwan. According to the relics found at historical sites dating from the prehistoric era, how old is Taiwan’s history?

Ss: Five thousand years.<sup>12</sup>

Ss: 86 years.<sup>13</sup>

---

<sup>12</sup> This study does not focus on students’ learning of history. It is interesting to note, however, how Mr. Lin’s students make sense of Taiwan’s history. This answer suggests that the student considers Taiwan a part of China and he considers the history of Taiwan to be the same as the history of China, 5,000 years old, a message that is reinforced by both the government and the media.

<sup>13</sup> This answer suggests that the student assumes that the history of Taiwan is equivalent to the history of the ROC. December 4, 1997, the day of this observation, was the 86<sup>th</sup> year of the ROC on the ROC calendar, a calendar adopted by the ROC in lieu of the western calendar. People on Taiwan usually record time based on the ROC calendar.

Mr. Lin wanted the students to examine the chronological table on the handout, explaining several prehistoric sites. Using the handout, he described each site and its location. In the last ten minutes of class, Mr. Lin asked students to open the textbook and he read to the students.

### **Vignette Two: Neo-Taiwanese**

While covering the textbook section for the day, “Our Ancestors Came from *Da-lu*,” Mr. Lin read the text to the class, punctuating his reading with critiques. He began class by briefly reviewing the section that was taught in the previous class. He asked questions that takes a fill-in-the-blank form and students recited important information from the textbook. Then Mr. Lin asked students to open the textbook and he reread the first paragraph:

T: Look at the first sentence of the first paragraph: “Taiwan is located off the southeastern coast of our country (China).” Is this statement a correct description of the geographical location of Taiwan?

Ss: Yes.

T: Why?

S: Because this is what the textbook says.

T: Not all information found in textbooks is correct. This statement about the location of Taiwan is not correct. What does “our country” mean in this statement? It means *da-lu* (the mainland), China. In the previous class, we discussed the fact that China is not our country. Thus, this statement about the location of Taiwan is not correct. There are a variety of ways to describe the geographical location of Taiwan. Who remembers one or two statements that I made to you in our last class?

Some students responded by reading out loud that, “Taiwan is an island straddling the Tropic of Cancer in the western Pacific Ocean.” Mr. Lin praised them and then called on a student, asking him whether he considered *da-lu* (the mainland) to be his country.



The student said that *da-lu* was not his country because it belonged to the PRC. Mr. Lin responded:

Correct. Very good! Let's clap for him. China is an abbreviation for the People's Republic of China. *Da-lu* does not belong to us; it belongs to China. Our country is Taiwan.<sup>14</sup> Taiwan and China are not in the same country.

Mr. Lin then read the second sentence of the first paragraph and indicated that the textbook authors should not have used the term mountain *turng-bau* (siblings) to refer to aborigines; they are *yuarn-juh-ming* (aboriginal tribes) not mountain *turng-bau*.

Mr. Lin then added the topic of aborigines to this section. He mentioned the Pin-po tribes, telling students how the Chinese settlers had interacted with the Pin-po tribes and how the Pin-po tribes were assimilated into the Chinese Han community. He emphasized the point that Taiwanese are not pure Chinese Han descendants, because Chinese settlers who came to Taiwan during the Ching dynasty married into Pin-po tribes. Students appeared surprised by Mr. Lin's assertion, and several students seemed to disbelieve him.

Nevertheless, Mr. Lin continued his lecture and his reading of the textbook. When he read the sentence, "All of our ancestors came from the mainland," he stopped again, defining the concept of "ancestors" differently from that of the textbook:

Not all of our ancestors came from China. There is a problem with the concept of "ancestors." For instance, I have many ancestors, including my grandparents, great-grandparents, and their parents and grandparents. Among them, only one ancestor(s) was born in China and this ancestor migrated to Taiwan. That ancestor's descendants were born on Taiwan and they stayed in Taiwan as their homeland, never going back to China. In this sense, Taiwan is mainly my

---

<sup>14</sup> Typically, the KMT government uses "Taiwan" as a geographical term only. For Chinese nationalists, the statement "our country is Taiwan" is not acceptable. According to the government's pronouncements, the state of Taiwan is referred to as the Republic of China instead of Taiwan.

ancestral home, rather than China. Moreover, among our female ancestors, some of them probably were Pin-po women since the majority of Chinese settlers who migrated to Taiwan during the Ching dynasty were mostly single men.

He then directed students back to the textbook and read from it again. He explained how to read the map of Chinese migration from China to Taiwan during the Ming and Ching dynasties. After finishing with the map, Mr. Lin read from the textbook again: "Taiwanese ancestors mostly migrated from the Fukien and Kwangtung provinces."

Mr. Lin then left the textbook and told students about the concept of neo-Taiwanese, focusing on the four ethnic groups in contemporary Taiwan. He told students the size of each group's population, each group's language, and their ancestral homes. He then explained that all are neo-Taiwanese are not *jung-guor rern* (citizens of the Chinese nation-state):

These four groups -- the Fu-lo, the Hakka, new residents (mainlanders), and aboriginal tribes -- should develop the same identity of being neo-Taiwanese since all of them live in Taiwan. Neo-Taiwanese are definitely not *jung-guor rern* (citizens of China) because our nationality is that of Taiwan, not China.

Mr. Lin continued his lecturing. He argued that over 400 years ago, the descendants of the first generation of Chinese settlers who migrated to Taiwan developed a Taiwanese identity, having planted their roots in the soil of this island. Therefore, it is not necessary to emphasize the Chinese roots of Taiwanese ancestors.

For the rest of this class, Mr. Lin emphasized a civic concept of national identity closely related to the country one lives in rather than the ethnic identity of one's ancestral home. He connected this civic concept of national identity to his concept of being Neo-Taiwanese. He then asked students how many of their parents came from other cities in

Taiwan. Half of the class raised their hands. Mr. Lin probed further: “Do you consider your parents’ homeland to be your homeland? Or do you consider Taipei your home?” Students responded that they considered Taipei their homeland, rather than their parents’ homeland. Mr. Lin agreed with them and told them about his own children who were born and raised in Taipei and who did not like to go with him back his home in central Taiwan during the lunar new year holidays. He told the class that his son said that, “Taipei is my homeland but your homeland is not mine. I want to stay in Taipei.” Mr. Lin continued, “Our ancestral origin has nothing to do with our national identity”:

Regardless of the historical fact that our ancestral home is in China, no matter where our ancestors came from and whenever they came to Taiwan, now we are all neo-Taiwanese. Our roots are in Taiwan. The Chinese people often emphasize this concept by saying *laug-yeh guei-gen* (leaves always fall back to the roots). This saying is a metaphor, expressing that when one gets old, one thinks of going back to one’s hometown or one’s country of origin. But this is an outdated concept of roots. Chinese immigrants in other countries -- even when they become citizens of other countries -- always emphasize their Chinese roots and their identity of being *jung-guor rern* (citizens of Chinese nation-state). Similarly, new residents (mainlanders) who have lived in Taiwan for almost 50 years still consider China as their motherland and have more concern for China than for Taiwan. As citizens of a modern state, we need to get rid of the Chinese concept of roots and replace it with a new concept of roots. We should identify ourselves as neo-Taiwanese rather than Chinese. As neo-Taiwanese, we love and vow to protect the island where we live. We have to regard Taiwan as our country instead of identifying China as our country. This is the real meaning of being a citizen of Taiwan. Our Chinese ancestral origin has nothing to do with our identity as citizens of Taiwan. As we study this section of the textbook about our ancestral origins, I would like to tell you about the new concept of roots and the meaning of being neo-Taiwanese.

### **Vignette Three: The Dutch Rule and Cheng Cheng-kung’s Rule**

Again, Mr. Lin mainly lectured, focusing on the Dutch rule and the arrival of Cheng Cheng-kung. He began this class with a question. Reading the title of the section, “The Era of Dutch Occupation,” out loud, he objected to the wording of title

“Occupation” was a misnomer. He asked students: “Before the Dutch landed on southern Taiwan in 1624, did any government administrate Taiwan?” Some students claimed that, at that time China ruled Taiwan, others said that aboriginal tribes owned Taiwan. Mr. Lin told students that before the arrival of the Dutch, Taiwan did not belong to any country and that Taiwan definitely belonged to its residents, the Taiwanese aboriginal tribes:

T: The Chinese claim that ever since ancient times, Taiwan has been part of China. They are wrong. Before Chinese settlers came to Taiwan to make it their home, who lived in Taiwan?

Ss: Taiwanese aboriginal tribes.

T: Right. It is not incorrect to say that since ancient times, China has ruled Taiwan.

Then Mr. Lin continued lecturing about Dutch rule. He read the paragraph in the textbook in which Dutch rule was described as “exploiting Taiwanese *turng-bau*’s labor and taking their properties by force.” Mr. Lin explained that the Dutch did not treat Chinese settlers well because the Dutch focused on carrying out trade with other countries (such as Japan and China) and used Chinese settlers’ labor to produce sugar cane, rice, other agriculture products, and deer skins. The Dutch ruled Taiwan as a colony. However, according to Mr. Lin, the Dutch played an important role in the development of Taiwan:

The Dutch hired Chinese settlers from China and encouraged them to open up farmlands. In order to improve the efficiency of the laborers tilling the land, the Dutch brought oxen to Taiwan to help the farmers work the land. In addition, they introduced Christianity and rudimentary education to the aboriginal tribes.

As they read the section on the era of Cheng family rule, Mr. Lin criticized the textbook again:

The textbook authors and the majority of history texts claim that Cheng Cheng-kung recovered Taiwan. What do they mean by “recover”? It means that someone else has taken away your property and then you get it back. The use of the word “recover” suggests that Taiwan originally belonged to the Ming emperors and that Cheng Cheng-kung took it back. Did the Ming dynasty ever rule Taiwan? If not, there is no reason to claim that Cheng Cheng Kung “recovered” Taiwan. Like the Dutch, Cheng’s troops occupied Taiwan as their military base, aiming to restore the Ming dynasty.

Mr. Lin continued with his lecture about the Cheng family’s rule over Taiwan. He argued that the textbook authors portrayed Cheng Cheng-kung as a Chinese national hero for his contribution to ousting the Dutch and introducing Chinese Han culture to Taiwan. He told students that there was an alternative view concerning the impact of the arrival of Cheng Cheng-kung on the life of Chinese settlers and Taiwanese aboriginal tribes:

Cheng Cheng-kung was one of the foreign rulers who came to Taiwan for their own interests. His goal was to develop Taiwan into a powerful and prosperous base in the service of the eventual liberation of China from the Ching Manchu barbarians and restoring the Ming dynasty. It was not for the sake of Taiwan itself. Under Cheng rule, the government implemented a tax policy that was very similar to that of the Dutch and the lives of Chinese settlers and Taiwanese aboriginal tribes did not change very much. The Cheng family, like the Dutch, considered Taiwan a colony.

#### **Vignette Four: The Recovery of Taiwan**

In this class, Mr. Lin focused on two themes: Japanese colonial rule and the recovery of Taiwan. He lectured throughout the class. When one or two students volunteered questions, he stopped to answer them tersely, returning quickly to his lecture. Mr. Lin read the textbook word by word, occasionally stopping to explain it. His explanations were not in complete agreement with the textbook authors. At times, he added his own opinions or criticized the textbook.

Mr. Lin began the class by briefly reviewing how the Ching emperor ceded Taiwan to Japan. He explained that the Ching emperor neither valued Taiwan as a

territory or the Taiwanese people as Chinese citizens. Ching officials considered Taiwan to be an island, “where birds do not sing and the flowers are not fragrant. Its people are not educated; the men are heartless, and the women faithless.” Thus, Ching officials told the emperor that “ceding Taiwan away would not be a pity.”

Mr. Lin continued his lecture suggesting that the Japanese administration over Taiwan was “both positive and negative”:

The Japanese exercised colonial rule over Taiwan, which had both positive and negative effects. Because Japan wanted to use Taiwan as a base to control southern Asia, Japan carefully managed Taiwan as its first colony and administered Taiwan as an experiment for learning how to run other colonies. The Japanese conducted surveys of the Taiwanese people and aboriginal tribes to learn about their customs, social norms, religions, agriculture, housing, family size, and demography. With a better understanding of Taiwan, the Japanese developed an effective administration for the management of Taiwan, something that had never been done by Ching officials. In 50 years of colonization, the Japanese transformed Taiwan into a modern society. For example, Japanese authorities established public elementary schools throughout the island, even deep in the mountains where the aboriginal tribes lived. However, they were only concerned with mass education at the elementary level and they did not provide advanced education to the Taiwanese people. For the Japanese rulers, education was used as a tool to both enhance the Taiwanese people's literacy and to develop a norm of obedience so that the Taiwanese people would abide by Japanese laws.

When Mr. Lin read the paragraph on Japanization policy in the textbook, he criticized the textbook authors for “exaggerating”:

This policy of Japanization was designed to transform the Taiwanese people into loyal citizens of Japan. The Japanese only implemented the policy when the China-Japan War started. The textbook authors are mistaken when they claim that the Japanese adopted the Japanization policy throughout all 50 years of their colonial rule. That is not true. The textbook authors exaggerate the situation.

In a monologue about the implementation of the Japanization policy, Mr. Lin contrasted Japanese and KMT rule in regard to cultural policy. He told the students that there was not a great difference between the two governments' attempts to eliminate

Taiwanese culture and languages:

The textbook emphasizes the fact that the Japanese prohibited the Taiwanese people from using their own language and forced them to speak only Japanese. The textbook authors criticize the Japanese language policy as “a tool aimed at eliminating the Taiwanese people’s Chinese nationalism.” However, we can also find something similar to Japanese colonial rule in the KMT government’s policy towards Taiwan over the past few decades. For instance, Taiwanese schools adopted a rigorous language policy that stipulated that Taiwanese children should be punished by teachers if they spoke in their mother tongues. Besides this language policy, with respect to history classes as well, Japanese educational policy was similar to that of the KMT. Under Japanese rule, Taiwanese children exclusively studied Japanese history. Similarly, under the KMT educational system, Taiwanese schools have not taught children about Taiwan history, but have instead suggested that our mission was to recover China.

When Mr. Lin then moved to the textbook section concerning the recovery of Taiwan, he directed students to a chronological table in which the establishment of the ROC in 1912 and the Anti-Japanese War (1937-45) were the two major events. He then guided students quickly through these tables and proceeded to tell students that these historical events (that happened in China) should be their history not our history.

Students appeared confused:

Ss: Not our history?

T: Yes, the history of the Anti-Japanese War is their history but not our Taiwan history.

Mr. Lin then asked students where the Anti-Japanese War took place; “*Da-lu* (the mainland),” they responded. Then Mr. Lin asked “During the war, where did the Taiwanese people live”?:

The Anti-Japanese War happened in China, not in Taiwan. During the war, Taiwanese people were citizens of Japan and they were taught to be loyal to the Japanese emperor. Some Taiwanese men were recruited to be soldiers in the Japanese army. At that time, Taiwanese people suffered from American bombing and a shortage of food. To learn more about their experiences during the war, ask your grandparents to tell you more stories. The stories that your grandparents tell

you are truthfully our history.

Again, Mr. Lin criticized the textbook: “Isn’t it odd that the textbook authors only tell us what happened in China -- our neighbor -- in detail, but do not tell us what happened at our home?”

The last paragraph in this section of the textbook involves a description of the recovery of Taiwan. Mr. Lin simply read the paragraph to the students. Instead of elaborating on the text, he then told the students what he thought about the textbook. First, he indicated that the textbook authors did not take the perspective of the Taiwanese people into account: How did the Taiwanese react to the change overnight in national identity, from being Japanese to being Chinese? Second, Mr. Lin told students that the return of Taiwan to China was not determined by the Taiwanese people but by three international powers. He refers to the “recovery” of Taiwan by the ROC as an “occupation”:

According to the Cairo Declaration, Taiwan was returned to China (the ROC). The fact is that Japan lost the war and surrendered to the Allies, but not to China. However, China represented the Allies in Asia and the Allies approved the move to send Chinese troops to Taiwan after Japan’s surrender. Afterwards, the Chinese troops did not leave Taiwan. They occupied Taiwan. The Taiwanese people were naïve and lacked an awareness of international law; so, they accepted KMT rule. At that time, we (the Taiwanese people) missed an opportunity to become independent.

Mr. Lin finished the textbook reading and went on to lecture about what happened to Taiwan after 1945. He focused on the arrival of the KMT in 1945:

When Chinese troops arrived in Taiwan to replace the Japanese as rulers in 1945, they looked like beggars and were rude, out of control. The KMT officials were corrupt and unable to manage Taiwan.

Mr. Lin also explained that, up until 1949, there was a war in China between the



KMT and the Communists. The KMT was defeated, so they retreated from China to Taiwan. Students raised their hands, wanting to know more about the civil war:

S: Are the KMT and the Communist Party in the same country?

S: Which party was the good one and which one was the bad one?

T: What do you think? I do not know which one is better than the other.

In the last three minutes of class, Mr. Lin concluded the unit. He told the students that the history of Taiwan is a record of the oppression of the Taiwanese by various foreign powers. He linked this historical experience to the future of Taiwan, calling for a Taiwanese identity to protect Taiwan from invasion by the PRC:

As you study Taiwanese history, you realize that the Taiwanese were often oppressed by outsiders. Now, at the end of this century, Taiwan and China are different from each other with respect to politics, economy, culture, and ideology. How would it be possible for Taiwan to be unified with China and accept the PRC's one party dictatorship? We need to think about that. We should demand the right to determine our own future and never let outsiders rule Taiwan again. We have to stand up so as to protect Taiwan from an invasion by the PRC.

### **Reading the Vignettes**

Mr. Lin wanted his students to learn the account of Taiwan history that was interpreted from a Taiwanese-centered perspective. Taiwan history, as represented in the textbook, starts with the section named "Our Ancestors Came from the Mainland." However, Mr. Lin started the unit on Taiwan history by the topic concerning the statement of Taiwan's geographical location. This location has been traditionally described as an island located off "the southeastern coast of our country (China)." He argued that students should learn how to describe the location of Taiwan from the perspective of Taiwan rather than from the perspective of China. In addition, Mr. Lin added the topic concerning the prehistory of Taiwan. He brought a supplemental teaching

material to students and led them to read the timetable of Taiwan's prehistory and each prehistoric site.

Mr. Lin explained to me the significance of the two topics in learning Taiwan history:

These two topics are related to which perspective we adopt to interpret Taiwan history. I want students to adopt a Taiwanese-centered perspective, relocating Taiwan in its own context rather than in the context of China. When they study Taiwan history, for instance, students need to know that in the context of time, Taiwan history does not start with the arrival of Chinese immigrants four hundred years ago; rather, it starts from earlier times. A geographical context is another important element that helps students to construct the sense of who they are. When students recite the statement provided by the textbook about the geographical location of Taiwan, they tend to make a mistake that Taiwan is part of China and that their country is China. If Taiwan is geographically placed in the context of China, then Taiwan history will be placed in the context of Chinese history too. We should teach students a Taiwanese-centered perspective, which reflects the reality that Taiwan is not a province of the PRC (Lin, Pre-observation-I # 1, 12/4/97).

Although Mr. Lin developed his own curriculum, he still follows the textbook in most classes. On one hand, he read the textbook to the students, on the other, he criticized the ideas presented in the textbook. When he taught the section on "Our Ancestors Came from the Mainland," he challenged the textbook authors' definition of "ancestors." He argued that among ancestors, the first Chinese immigrants to Taiwan are our ancestors who came from the mainland; but the second and the following generations were born and raised on Taiwan and they are also our ancestors. Therefore, not all ancestors came from China. In addition, he added a topic about the Pin-po tribes. Mr. Lin told the students that the Chinese immigrants risked their lives in illegally crossing the Taiwan Strait to Taiwan mostly during the era of Ching rule. Most of the immigrants were bachelors who then were married to Pin-po women when they settled down in

Taiwan. Mr. Lin concluded that the Pin-po tribes were also our ancestors. During the class, Mr. Lin moved fast when he had students read the textbook and study the map of Chinese migration routes. In the rest of the class that Mr. Lin lectured, he introduced a concept of neo-Taiwanese. He argued that Taiwan's four ethnic groups were neo-Taiwanese and they were not *jung-guor rern* (citizens of China nation-state). He concluded that, "our Chinese ancestral origin has nothing to do with our identity as citizens of Taiwan."

In a class where Mr. Lin taught students about Cheng's rule over Taiwan, he criticized the textbook by saying that Cheng Cheng-kung did not "recover" Taiwan; instead, he "occupied" Taiwan. In Chinese nationalists' eyes, Cheng Cheng-kung is a national hero who defeated the Dutch, expelled them out and, moreover, turned the island into a Chinese society. However, Mr. Lin expressed to students an alternative view that is different from the traditional account about this highly respected Chinese national hero.

Unlike the other participants, Mr. Lin did not intensively emphasize the oppression of the Japanese during Japanese colonial rule. He told students that Japanese rule over Taiwan had "negative and positive effects." One of the negative effects is the cultural policy of Japanization. Mr. Lin compared it to the KMT's cultural policy in the past four decades as he told students that they could see something similar between the two colonial powers in this respect.

The textbook authors ended the unit on Taiwan history with the Anti-Japanese War, because the war has been considered as the primary cause that led China to the recovery of Taiwan in 1945. Mr. Lin argued that the Anti-Japanese War did not take place on the island, and during the war, the Taiwanese were not citizens of China.

Therefore, Mr. Lin told students that, “the war is their history not our history.” Mr. Lin criticized the textbook for the lack of description about the Taiwanese people’s suffering during the World War II and, thus, the textbook merely told students about what happened in the “neighbor’s home” but failed to tell them “what happened in our home.”

According to my observations, Mr. Lin simply lectured most of the time, except for the first class, where students were engaged in studying the geographical location of Taiwan by looking at the globes. He occasionally asked students questions that were related to textbook knowledge. For him, teaching is nothing but telling, and transmitting to students what the teacher knows. He raised many controversial issues and challenged the textbook. Students appeared confused when Mr. Lin presented the alternative account of Taiwan history. However, Mr. Lin did not engage students to learn the interpretative nature of history that is behind the two conflicting accounts in his own instruction and in the textbook.

These individual case studies of each teacher’s classroom practice clearly demonstrate the way in which the three teachers vary one in their beliefs about the purpose of teaching Taiwan’s history, their selection of topic to focus on, and their approaches to engaging students. Both Ms. Chen and Ms. Hu want to impart a Chinese identity to their students while Mr. Lin wants to facilitate the development of a Taiwanese identity. In the next chapter, through cross-case analyses, I examine the differences and similarities among these three participants.

## CHAPTER SIX

### CROSS-CASE ANALYSES

In the preceding chapter, I presented descriptions of the practice of three teachers. Although the teachers that I interviewed and observed did seem to manifest several differences that research has suggested are significant, one perplexing result was that their teaching styles, while appearing quite different on the surface, were also quite similar. In this chapter, I describe those differences and similarities and propose a set of hypotheses that might account for them. The chapter is divided into two sections. In the first section, I discuss differences in each teacher's selection of topics. In the second section, I explain why they shared a pedagogical practice

#### **Selecting Different Subject Matter Themes as Curricular Foci**

Researchers (Kon, 1995; Parker, 1987) have found that a teacher mediates a curriculum and as a result, teaching varies from one classroom to another. This has proven to be the case with respect to these three Taiwanese classrooms as well. Despite the use of a state-prescribed textbook, each teacher emphasized different themes, or developed his or her unique focus as a result of his or her own sense of national identity.

#### **Theme One: Ancestral Home in China Versus Neo-Taiwanese Perspective**

When teaching the section "Our Ancestors Came from *Da-lu*," both Ms. Chen and Ms. Hu emphasized the Chinese heritage of the Taiwanese people and sought to emphasize the way in which the students' ancestral homes were on the mainland. Ms. Chen considered this lesson to be especially important, going so far as to declare that: "If students realize this historical fact about their ancestral home, they cannot then approve

of Taiwanese independence.” Ms. Hu adopted much the same attitude, stressing the importance of Chinese ancestral roots as a highly significant bond between Taiwan and China. Ms. Hu hoped that, by learning about their ancestral home, younger generations would develop an emotional attachment to their Chinese motherland, and claim a Chinese identity for themselves.

Consequently, both Ms. Chen and Ms. Hu devoted themselves wholeheartedly to the task of transmitting the idea of a Chinese ancestral home to their students. Ms. Chen insisted that the Taiwan province was not the ancestral home of the Taiwanese people. Nevertheless, one student in her classroom suggested that because not all of her ancestors were born on the mainland (she also had ancestors who were born and grew up on Taiwan), her ancestral home was Taiwan. Another student suggested that Africa might be the Taiwanese people’s ancestral home because our first human ancestors were early inhabitants of Africa, arguing, therefore, that Africa should be considered to be the Taiwanese people’s ancestral home.

Ms. Chen flatly denied the validity of these alternative perspectives. She neither reexamined her own assumption about the meaning of “ancestors,” nor gave any further consideration to her students’ ideas.

Ms. Chen even made efforts to construct an argument that in all likelihood the ancestors of Taiwanese aboriginal tribes also came from China. She presented as a fact what in reality is a controversial theory, that Taiwan was once geographically connected to China in ancient times. Based on this assumption, Ms. Chen asserted that the ancestors of Taiwanese aboriginal tribes “walked from there (China) to here (Taiwan).” Ironically, she then told students that the ancestral home of the Taiwanese aborigines was Taiwan

Province.

Ms. Hu checked her students' answers to the textbook survey of what they considered to be their ancestral home and, like Ms. Chen, she insisted that it was wrong to claim that the Taiwanese people's ancestral home was on Taiwan. Ms. Hu also tried to encourage those students who claimed that their ancestral home was in Taiwan to find a "correct" ancestor. In addition, Ms. Hu's students were asked to carefully study the maps showing the locations of their ancestral home on the mainland and the routes that their ancestors took when crossing the Taiwan Strait 300 years ago.

By contrast, Mr. Lin was highly critical of the official textbook definition of ancestors, which concerned itself almost entirely with ancestors whose home was on the mainland. Mr. Lin argued that he had many ancestors who were born and grew up in Taiwan. He explained how these ancestors considered Taiwan to be their ancestral homeland, because their family had decided never to return to the mainland. Unlike Ms. Chen and Ms. Hu, he generally played down the issue of ancestral homelands and directed students more towards a neo-Taiwanese perspective on identity. He told students that the question of ancestral origins in China was not as important as the issue of contemporary Taiwanese identity. Mr. Lin told students that the question of one's ancestral home should not be the determining factor of one's national identity, emphasizing the point that being neo-Taiwanese did not mean that one was *jung-guor rern* (a citizen of the Chinese nation-state).

### **Theme Two: Our Country -- China Versus Our Country -- Taiwan**

Another primary point of divergence that emerged from my observations is that Ms. Hu referred to China as "our country" while Mr. Lin emphatically declared that

Taiwan was “our country.” Both teachers used a map of the ROC to engage students in the visualization of the territory of “our country.”

In the discussion of the issue of ancestral homelands, Ms. Hu pointed to the mainland on the map of the ROC, asking students what it represented. Students responded that it was the map of the ROC. When comparing the map of the PRC with that of the ROC, Ms. Hu indicated that there were differences between the two maps in the number and area of administrative provinces. She thus obscured one of the most confusing problems for young citizens of Taiwan -- knowing what the boundaries of the ROC territory are -- and taught students to identify the mainland as “our country.” Ms. Hu’s Chinese-centered identity is the typical or dominant one: the ROC represents China and it officially claims as its territory the mainland, Taiwan, and the Penghu Islands (Pescadores).

Students in Mr. Lin’s class had a dramatically different experience in the discussion of national identity. Mr. Lin emphasized over and over again that “our country is Taiwan, not China.” He challenged the textbook, pointing out the way in which statements in the textbook concerning the location of Taiwan were clearly incorrect. (Because this study did not include research on students’ thinking, however, we do not know what sense students made of these emphases.) He told students that, in reality, the territory of “our country” did not include the mainland. He suggested that the map of the ROC represented a false message concerning the national territory of Taiwan, and he explained to the students that the country referred to as the PRC, on the mainland, is officially recognized as China by the international community.

The students, however, became confused. One student asked, “If the mainland



does not belong to us, what should our country be?" Another student, when asked to describe the location of Taiwan, recited the textbook definition, "Taiwan is located off the southern coast of our country (China)." The student's answer would not be wrong on an examination paper. It seems that Mr. Lin had difficulty persuading some to accept his account of national identity. It is difficult for a teacher to challenge official knowledge found in the textbook, particularly when students have internalized this official knowledge about the national boundaries as a result of indoctrination by both their parents and the media.

### **Theme Three: Two Great Men Who Recovered Taiwan Versus Two Political Figures Who Occupied Taiwan**

Around the world, children in history classes are expected to learn about national heroes -- this serves to reinforce a sense of national identity. The heroes included in textbooks are usually those historical figures who had a major impact on the birth and development of a nation. In Taiwan, students are usually required to learn about two historical figures: Cheng Cheng-kung and Chiang Kai-shek. As might be expected, however, the three study informants interpreted these two historical figures quite differently and their students were sent different messages.

Both Ms. Chen and Ms. Hu taught students that Cheng Cheng-kung was a national hero who made great contributions to Taiwan's development. In Ms. Chen's class, students heard the official story of Cheng Cheng-kung: a national hero who expelled the Dutch and recovered Taiwan, "devoting himself to developing Taiwan into a place where people could live in peace and contentment." Ms. Hu told students that Cheng Cheng-kung was an important person who "ousted the Dutch, recovered Taiwan, brought many Chinese settlers to this island, and devoted himself to building a Chinese

community on Taiwan” (Hu, O # 5, 12/27/97).

By contrast, Mr. Lin criticized the textbook’s use of the term “recovery” to describe Cheng Cheng-kung’s occupation of Taiwan. Mr. Lin argued that Taiwan did not belong to the Ming dynasty at the time that the Dutch ruled the island. Therefore, it was wrong to describe Cheng Cheng-kung’s arrival as a “recovery.” In addition, Mr. Lin argued that Cheng Cheng-kung’s administration was little different from that of the Dutch from the perspective of the residents of Taiwan at that time, asserting that the Cheng family’s rule was simply another form of colonial rule.

This general pattern was repeated with respect to the story of Chiang Kai-shek. History textbook authors emphasized that Chiang Kai-shek, for the second time in Taiwan’s history, recovered Taiwan from foreign rule. Following the official textbook line, both Ms. Hu and Ms. Chen emphasized the importance of Chiang Kai-shek’s leadership in determining the fortunes of the people of Taiwan. Ms. Chen told students that Chiang Kai-shek “took pity on the suffering of the Taiwanese people under Japanese rule,” and demanded that Japan return Taiwan to China. Ms. Hu emphasized that, due to the eight-year-long Anti-Japanese War and the kindness of Chiang Kai-shek, Japan surrendered to China, returning Taiwan. Both teachers taught students to appreciate Chiang’s “kindness,” for he saved the Taiwanese people from the hell of Japanese colonial rule. This is clearly highly misleading. Hughes (1997), for example, claims that Chiang Kai-shek wanted Taiwan back because of its importance to China’s national security. This was even what Chiang Kai-shek himself asserted in his book, China’s Destiny.

Mr. Lin’s view concerning the so-called “second recovery of Taiwan” by Chiang

Kai-shek was quite different. Mr. Lin asserted that when the Ching dynasty ceded Taiwan to Japan, Taiwan became a territory of Japan and no longer belonged to China. Thus, according to Mr. Lin, the suggestion that “Taiwan shall be restored to the ROC,” announced in the Cairo Declaration, is incorrect. Mr. Lin explained how, after the war, the KMT government took over Taiwan, and that this represented an “occupation,” not liberation. Mr. Lin told students that because the Taiwanese people of that period lacked sufficient knowledge concerning international law, they did not know how to claim independence, just as with Korea, thus missing an opportunity.

Both Ms. Hu and Ms. Chen believe that Taiwan has always been part of China. Therefore, the language of “recovery” makes sense to them. By contrast, Mr. Lin believes that Taiwan is not part of China. Although Taiwan was ever once ruled by the Chinese Ching dynasty, it was then ceded to Japan based on a treaty. In Mr. Lin’s view, Cheng Cheng-kung and Chiang Kai-shek were two political figures who used Taiwan as a colony upon which to further their own political interests, in a way that was highly similar to Dutch and Japanese colonial rule.

#### **Theme Four: Aboriginal Tribes Versus Chinese Han People**

Similarly, when the theme of Taiwanese aboriginal tribes was brought up in each classroom, students again had different experiences. Both Ms. Chen and Ms. Hu tended to adopt a Chinese-centered perspective in describing Taiwanese aboriginal tribes. Mr. Lin adopted a Taiwanese-centered perspective. This is seen quite clearly in the way in which each teacher portrayed Taiwanese aboriginal tribes, in terms of their origins and interactions with the Chinese Han people.

When Ms. Chen taught students that all Taiwanese ancestors migrated from the

mainland, she claimed that the Taiwanese aboriginal tribes' ancestral home was also on the Chinese mainland. She proclaimed that a Pin-po tribe, the Ketagalan, were the first group of residents of Taipei before the arrival of Han people; she did not give the students much in the way of details concerning the aboriginal tribes, probably because she knew very little about them herself.

In one class, Ms. Hu taught students about nine aboriginal tribes in Taiwan today, during only one class period. She used a handout providing more information about Taiwanese aborigines to supplement the textbook. In another class, however, when the story of Wu-sha was discussed, Ms. Hu did not examine (or even acknowledge) the racism evident in the Han version of this story. Axtell (1987) and others have described the way in which textbook accounts of the history of Native American Indians have been biased, filtered through the lens of white people's ethnocentrism. Similarly, the story of Wu-sha that Ms. Hu selected from a supplementary book represented an extremely ethnocentric Han interpretation. Wu-sha was described as a hero who contributed to the development of Chinese settlements on the I-lan plains. Students were taught that the aboriginal tribes "occupied" I-lan and, therefore, Chinese settlers were unable to open up the lands. In addition, students were allowed to talk about aboriginal tribes as barbarians who, for example, had the custom of cutting off the heads of their opponents for the purpose of religious ceremonies. Ms. Hu nodded, explicitly (although not verbally) approving of the students' mistaken impressions.

By contrast, Mr. Lin explained to the students that some Taiwanese people (*been-sheeng rern*) were not pure Han descendents, but rather children of marriages between Han men and Pin-po women. In another class, when he taught students about the

textbook section on Chinese settlers' contributions to Taiwan's development, Mr. Lin told students that the Chinese settlers were "invaders who occupied the lands of the aboriginal tribes and forced them to migrate to the other places" (Lin, O # 6, 12/24/1997). He also explained that there were tensions between Chinese settlers and aboriginal tribes during the era of the Chinese settlement in Taiwan. Mr. Lin accurately told students that Chinese settlers simply occupied the land of the Pin-po tribes by force and cheated them out of their land in various ways.

For both Ms. Hu and Ms. Chen, Taiwan has been part of China since ancient times. Thus, Ms. Chen claims that aboriginal tribes originated from China and Ms. Hu stresses the contribution of Chinese settlers to the development of Taiwan, completely ignoring the role of Chinese settlers as oppressors who invaded aboriginal tribal lands.

In contrast, Mr. Lin wanted students to understand the place of aboriginal tribes in Taiwan's history. However, because Mr. Lin was required to cover the material in the textbook and to transmit official curricular information to students, he was only able to painted a fragmented picture which represented a blend of the official Han-centered perspective with an overlay of his own critique of that official perspective.

#### **Theme Five: Chinese Versus Foreign Rulers**

In both Ms. Chen's and Ms. Hu's classes, when the subject of foreign rule was introduced, the non-Chinese colonial administrations were always described in negative terms. At the same time, the great contributions of Chinese rulers was always emphasized. Both women tended to cultivate students' hostility toward the Japanese and Dutch for their respective oppression of the Taiwanese people. For instance, when a student of Ms. Chen brought up the subject of the land survey conducted by Japanese

rulers, the student did not explicitly indicate that the Japanese used the land survey to exploit the property of the Taiwanese people. On the spot, however, Ms. Chen launched into an argument that the Japanese had confiscated the land of Taiwanese people based on the data collected from the survey. As a matter of fact, the land survey was part of the land reform that launched Taiwan on the path of development as a modern society. As a result of the land survey, Japanese rulers introduced the legal protection of private property for tenant farmers and established a land tax system based on which citizens who owned lands were obligated to pay taxes (Gold, 1986). While the motivation of the Japanese may have been to garner political support from the popular classes, this does not undermine the contribution.

Ms. Hu's attitude towards foreign rulers was very similar to that of Ms. Chen. In a discussion of Japanese rule, for example, Ms. Hu told her students that "(Japanese) teachers only taught them (Taiwanese students) Japanese history; Taiwanese students were not allowed to study Taiwan history." Ms. Hu focused students' attention on the negative aspects of Japanese rule. She told students, for instance, that the establishment of a sugar refinery served only to exploit the labor of the Taiwanese people. Neither Ms. Chen nor Ms. Hu mentioned how the Japanese transformed Taiwan into a modern society with a modern transportation system, state-run hospitals, banks, and electricity.

In their discussions of Chinese rulers, however, Ms. Chen and Ms. Hu emphasized only the positive. Ms. Hu told students that Cheng Cheng-kung and two Ching officials, Sheng Bau-jeng and Liu Ming-chuarn, were three important historical figures who contributed to Taiwan's development. She emphasized that, due to the efforts of the Ching official Liu Ming-chuarn, Taiwan became "the most advanced

province in China” and, at that time, “the Taiwanese people were the happiest people in the world.” Similarly, Ms. Chen spoke of Cheng Cheng-kung as a ruler who “truly loved the Taiwanese people and devoted himself to the development of Taiwan.” When Ms. Chen taught students about the administration of Liu Ming-chuan, she emphasized that “due to his administration, Taiwan became a modern society with railroads and an electricity system” (Chen, O # 9, 1/5/98).

Obviously, in both Ms. Chen and Ms. Hu’s classes, a central principle of their interpretations of Taiwan’s historical development is that only Chinese rulers made positive contributions while foreign rulers -- the Dutch and the Japanese -- oppressed the Taiwanese people and did not contribute to the development of Taiwan.

Mr. Lin, however, sees every power that dominated Taiwan -- from the Dutch to Cheng Cheng-kung, from the Ching dynasty to Japanese rule -- as colonialism. None of these administrations, according to Mr. Lin, were primarily concerned with the wellbeing of the Taiwanese people. Nevertheless, each regime contributed something to Taiwan’s development. For instance, when he discussed the era of Dutch rule, he told the students that the Dutch had a favorable impact on agriculture and the civilization of Taiwanese aboriginal tribes through the introduction of rudimentary forms of education, as well as Christianity. When students studied an account of Japanese rule in the textbook, Mr. Lin indicated that Japanese colonial rule was “both negative and positive.” He told students that: “The Japanese transformed Taiwan into a modern society.” When students read the paragraph about the policy of Japanization, Mr. Lin criticized the textbook authors for having “exaggerated the policy,” because that policy was carried out only during the war. Making a comparison between Japanese and KMT rule, Mr. Lin told the students that,

over the past four decades, the ruling KMT party has used the system of education system to systematically eliminate the Taiwanese people's (*been-sheeng rern*) cultural heritage.

When Chinese rule was discussed, Mr. Lin reminded students that, "Cheng Cheng-kung's rule was little different from that of the Dutch; all foreign domination of Taiwan represented colonialism." He also told them that Cheng Cheng-kung did not establish schools in Taiwan for the purpose of educating ordinary people. He told students that, "Taiwan's system of public education for everyone only began under Japanese colonial rule."

In one class, Mr. Lin told students why Liu Ming-chuarn, a Ching official, chose to make Taiwan the first province in China to have a railroad line longer than 40 miles:

Originally, the Ching dynasty wanted to establish railroads in Shanghai but the residents of Shanghai could not accept the innovation. Because the Taiwanese were open-minded, however, and welcomed all innovation in Taiwan, Liu Ming-chuarn asked the Ching emperor to move the railroad project to Taiwan.  
(Lin, O # 8, 1/8/98)

When students learned about the treaty of Shimonoseki (a result of the first Sino-Japan war), Mr. Lin told students:

The Ching emperor ceded Taiwan to Japan. Certain Ching officials at that time referred to this island as, "a place where birds do not sing and the flowers are not fragrant. The men are heartless and the women faithless." Therefore, it was not a very painful thing for the Ching dynasty to cede Taiwan to Japan.

It appears to be the case that, in each of these three case studies, each teacher's political orientation and knowledge of the subject matter played a key role in the determination of his or her teaching style. Moreover, despite the fact that all three informants used the same state-mandated textbook, each teacher functioned more as an ideological policy broker than as simply an implementation of a fixed curriculum



(Schwille et al., 1983). Each chose to emphasize topics that facilitated the propagation of his or her own ideological stance, and all felt quite free to introduce students to additional topics deemed important.

In conclusion, then, because of their lack of knowledge concerning Taiwan's history and their understanding of that history filtered through a rigid interpretation from a Chinese-centered perspective, both Ms. Chen and Ms. Hu tended to primarily follow the textbook. Yet, they also added "facts" that had been dropped from previous textbooks, believing that that "knowledge" remained important for students to know. Mr. Chen asserted, for example, that Taiwanese aboriginal tribes originated in China and walked to Taiwan during early geological periods. Ms. Hu added information concerning the story of Wu-sha, practically painting him as a savior of the aboriginal tribes.

Mr. Lin also followed the textbook, adding information he thought that the students should know. He explained to the students, for example, what it meant to be neo-Taiwanese and the truth about the relationship between Chinese settlers and the Pin-po tribes. Because his understanding of Taiwan history is rich and not limited to the knowledge provided by the text, the additional topics that Mr. Lin selected for instruction were generally presented in a historically correct fashion, in stark contrast to the additional information provided by Ms. Hu and Ms. Chen.

Therefore, to whatever extent they recognize it (or fail to do so), all three informants were clearly ideologically motivated in the selection of the topics they teach. Mr. Lin, for example, simply read the section of the text on the Anti-Japanese War and did not elaborate further. He explained the reason for his indifference by telling students that, the war was not "our history." This war, according to Mr. Lin, happened in China

and, at that time, *been-sheeng rern* (Taiwanese) were citizens of Japan. Thus, Mr. Lin believes that the Anti-Japanese War is not a part of the historical experience of *been-sheeng rern*. It is, of course, critical to point out that for mainlanders the war is part of their or their parents' historical memories. Mr. Lin ignored this point.

Both Ms. Hu and Ms. Chen are in favor of a one China policy, stressing the importance of the claim that the roots of the Taiwanese people (*been-sheeng rern*) are in China, and that Taiwan is part of China. Thus, both denied the validity of the alternative definition of ancestral homeland when students claimed that their ancestral homeland was Taiwan. Their bias towards a Chinese identity also led to their teaching from a fully Chinese, ethnocentric perspective; one which glorified Chinese rulers and was highly critical of other colonial regimes.

In sum, my observations suggest that the three teachers varied a great deal in the content that they taught and they did so along ideological lines that reflected their own sense of national identity. But as Cuban (1993) claims, the “how” and the “what” of teaching and learning are married (p. 285). With this in mind, I now turn to a discussion of “how” each teacher taught.

### **Similarities and Differences in Pedagogy**

On the surface, the three teachers' pedagogical practices appear to be very different. Ms. Chen claimed that she adopted a “constructivist approach” by asking students questions; but her interpretation of constructivism is highly problematic. Ms. Hu relied heavily on the textbook, generally lecturing, highlighting important information, and occasionally asking students questions to test their mastery of that highlighted information. Mr. Lin read the textbook word by word but often criticized its

content. Most of the time, he lectured for the entire class period.

Strictly speaking, however, all three teachers share a teacher-centered form of instruction. Cuban (1993) defines teacher-centered instruction as a pedagogy in which the teacher dominates classroom discourse and rarely conducts small-group activities or individual instruction. Such teachers tend to rely heavily on textbooks to guide their curricular and instructional decision-making.

Here, I analyze classroom discourse as documented in each classroom, focusing on the role of the teacher in that discourse. Then, I connect each teacher's educational beliefs about teaching, learning, and learners, to his or her pedagogical practice.

### **Ms. Chen: A "Constructivist Approach"**

Ms. Chen claimed that she adopted a "constructivist approach" in the teaching of social studies because she organized her class around asking students questions. The questions she used to engage students to collect information, and to foster participation in classroom discourse were selected from the teachers' manual. The answers to those questions were presented as "facts" prescribed by the textbook. Ms. Chen believed that asking students to answer such questions aided in their memorization of what she saw as most important.

Ms. Chen's appeal to constructivism is problematic, for she appears to have misunderstood what scholars mean by constructivist pedagogy. The features of a constructivist approach include a teacher facilitating students' construction of their own knowledge rather than giving students fixed knowledge, prescribed by a textbook; it involves students' exploring different ways of learning and a variety of different -- and even controversial -- perspectives. These were not part of Ms. Chen's pedagogical

practice.

Consider, for example, her reaction to students' different perspectives about their ancestral homeland. Ms. Chen created the appearance of permitting dialogue for the sake of discovering the "truth" by inviting a student who had asserted that her ancestral home was Taiwan to express her opinion. But then Ms. Chen also clearly attempted to steer her students in the direction of asserting that their ancestral homeland was on the mainland in an obvious attempt to arrive at a common consensus. Ms. Chen created a situation where the majority opinion was allowed to dominate all others. Kelly (1986) called this role the "exclusive partiality perspective."

Ms. Chen gave no appearance of being aware of her exclusive partiality perspective; rather, she felt satisfied that she had persuaded the student who originally disagreed with her to accept the idea about her Chinese ancestral home:

I allowed that student who said that her ancestors were born on Taiwan to express her opinion. I also invited other students to express themselves. Eventually, we worked together and found the answer that only the ancestors of Taiwan's aboriginal tribes were born on Taiwan. I helped this student corrected her mistake about her ancestral origin. (Chen, Post-I # 4, 12/18/97)

Although Ms. Chen provided opportunities for students to express their own views, she clearly promoted the opinion that coincided with her overarching goals, ignoring or denouncing opinions that did not mesh with her own.

When Ms. Chen asked students to respond to her questions, she also selected and directed their discourse. For instance, when she asked a question concerning why the Dutch rulers were so brutal, the students concluded that, since the Dutch were foreign rulers, they treated the Chinese settlers badly. Ms. Chen was satisfied with the answer because that conclusion was a key point that she was attempting to get across to the class.

She explained:

Once students could spell out the idea that the foreign rulers exploited the labor and properties of the Taiwanese people, and the way that they oppressed our ancestors, then I feel that I have been successful in achieving my intended teaching purpose. I hope that it will help develop a spirit of Chinese nationalism in them, when they know how foreign rulers bullied us. (Chen, Post-I # 5, 12/22/97)

Often when Ms. Chen claimed to use questions to stimulate students to think, she was in fact using strategies either to ask students to recite from the textbook or to induce students to speak about a topic in such a way that fit her intended purposes. Classroom discourse almost never involved a discussion of different perspectives nor were students allowed to pursue their own interests. It is most difficult, therefore, to see this as a constructivist approach.

#### **Ms. Hu: Teaching as Transmitting Textbook Knowledge to Student**

Partly influenced by the role model presented by her history teacher in middle school, Ms. Hu conceptualized teaching as transmitting textbook knowledge to students. Her pedagogy was also heavily influenced by parental expectations that the teacher should help students master important information prescribed by the textbook, especially information that would be important for future examinations.

Ms. Hu focused exclusively on the students' mastery of the textbook. Teaching activities were organized to accomplish this singular purpose. She highlighted information that she considered to be of greatest importance and presented key points on an overhead projector. She asked questions like: "What provinces were the ones where the majority of our ancestors came from? How many years did the Dutch occupy Taiwan? How did Liu Ming-chuarn establish Taiwan?" One quiz that was given to

prepare students to take the school's final examination, Ms. Hu asked multiple-choice questions like, "Which country (Japan, the Dutch or the Spanish) occupied Taiwan for the longest time?"

Sometimes, Ms. Hu used films to engage students in learning the prescribed material. In one class, students watched a tape in which Cheng Cheng-kung's story was introduced in the form of a cartoon. After watching the film, students were asked to complete a fill-in-the-blank assignment. All of the questions called for a recitation of "factual" information that appeared in the film: "Cheng Cheng-kung died at \_\_\_\_ (age). Cheng Cheng-kung encouraged Chinese settlers to open up farming lands, fishing and \_\_\_\_."

Ms. Hu's pedagogy reminds one of Shaver's observation in the 1970s (Cuban, 1993):

The students' social studies classes are strikingly similar to those that many of us experienced as youngsters: textbook assignments followed by recitation led by a teacher, who, in his or her own way, likes students and tries to show concern for them. (p. 210)

### **Mr. Lin: Teaching as Preaching**

Because fourth graders do not possess sufficient basic knowledge as a foundation for learning history, the best way to teach them is to directly tell them the information that the teacher wants them to learn. In case students still do not understand what the teacher said, the teacher needs to inform students of the same topic over and over again. (Lin, Post-I # 7, 31/12/97)

Mr. Lin lectured. He was a social activist who advocated Taiwanese identity in his classroom by preaching an ideology of Taiwanese independence. Using subject matter that facilitated the transference of his sense of Taiwanese identity, Mr. Lin patiently corrected the factual errors made in the textbook and told students what he believed to be the real facts concerning Taiwan's history. He struggled to instill a

political ideology in his students, one that would serve to replace the KMT's official Chinese identity with a neo-Taiwanese perspective.

Although Mr. Lin often criticized the textbook, his pedagogical practice did not differ significantly from that of Ms. Chen or Ms. Hu. He too was authoritarian, completely dominating classroom discussion and failing to provide students with adequate opportunity to express their own opinions.

One is left wondering what sense students made of his lectures. On the one hand, Mr. Lin read from the textbook. On the other hand, he directly indicated that there were very serious errors in the text. Students often appeared confused with the conflicting accounts that bombarded them from two sides. When Mr. Lin used the official map of the ROC, for example, to ask students whether there was something wrong with the map in terms of the territory of "our country," the students were confused. Since the title of the official map was the Republic of China, according to the map, those students who declared that our country was the ROC were not wrong. Mr. Lin was hampered by his failure (or inability) to make sufficient use of alternative visual aids, for instance, a world map issued by another country, so as to help students visualize the territory of the PRC. Mr. Lin tended to force students to accept his account, that mainland China belonged to another country. Students often remained confused and some resisted.

During our interviews, Mr. Lin emphasized that the historical importance of the record of our human past was constructed by historians in the service of the people who were in power. He is aware of the interpretative nature of history. He did not, however, engage students in actively thinking on their own about the interpretative nature of the history that they encountered in his classroom. Instead, Mr. Lin directly told students

what was wrong with the ideas prescribed by the textbook. He gave students another account, wanting them to believe in these new ideas. It is quite possible that Mr. Lin's account was seen by students as simply representing an alternative authority, in addition to the textbook. He did not really help students internalize and transform new information and he did not provide students with opportunities to understand the tentative nature of historical knowledge.

Occasionally, students asked questions. Often, Mr. Lin asked students direct questions, evaluating their responses. With this pattern of interaction, Mr. Lin dominated classroom interactions and the role of students remained a passive one. When he asked students how many years old the historical record of Taiwan was, he received answers of from 5,000 to 86 years. Mr. Lin said, "no" and directed students to look at the supplementary material to seek the right answer.

Sometimes, questions asked by Mr. Lin were used simply to test whether or not students had remembered his assertions. For instance, after the first class I observed, where Mr. Lin made efforts to explain why *da-lu* (the mainland) did not belong to Taiwan, in the next class, he asked students again whether or not *da-lu* belonged to Taiwan. A student answered that *da-lu* was not his country because it belonged to China. Approving, Mr. Lin asked the whole class to clap for this student.

### **Similarities in Teaching Practice**

Despite their different political orientations and knowledge of Taiwan's history, the three teachers displayed remarkably similar pedagogical styles. Ms. Chen only asked students questions that were relevant to textbook topics. Ms. Hu carefully read the textbook and asked students to highlight the key ideas. Mr. Lin criticized the textbook,



paying less attention to the textbook content, but lectured in a similar fashion and eagerly brought his own ideas to the students, as did the others. Each teacher is very authoritarian, dominating classroom discussions. Students in all three classrooms remained passive and were seldom given opportunities to discuss alternative perspectives. The differences, therefore, in the three teachers' political orientations and knowledge of the subject matter are not reflected in their pedagogical practice. While Mr. Lin appears liberal in his political orientation, his pedagogy remains conservative and traditional. While Evans (1993) suggests that "approaches to the teaching of history are linked, implicitly, to competing ideological orientation(s)" (p. 179), this tendency is not clearly demonstrated in these three cases, at least with respect to pedagogical style and classroom procedure.

Nor did teachers' subject matter knowledge appear to influence their approach to classroom procedure. Despite the differences in the three teachers' conceptualizations of history, their classroom activities are very similar. U. S. researchers (e. g., Ball & McDiarmid, 1990; Wineburg & Wilson, 1991) claim -- in a Western context -- that there is a link between a teacher's subject matter knowledge and his or her instructional practices. Wineburg and Wilson (1991), for example, documented the way in which two knowledgeable history teachers adopted instructional activities designed to actively engage students in understanding the interpretative nature of history. This tendency found in American classrooms, however, was absent in my informant's classrooms, even Mr. Lin's.

While U. S. researchers (e. g., Anderson, Avery, Pederson, Smith, & Sullivan, 1997) assume that teachers' perspectives of citizenship education also shape their

pedagogical styles, in Taiwan, different views of citizenship do not necessarily (perhaps even generally) translate into different styles of instruction. Ms. Chen wanted to educate her students to become critical thinkers, but her role as a teacher was highly authoritarian and she was not open-minded to student opinions that were at variance with her own. Similarly, Mr. Lin wanted his students to become actively democratic citizens, able to supervise the government in a critical fashion, yet he failed to create a democratic environment in any of his classes, wherein students were allowed to freely express their ideas, including alternative views from his own. With respect to Ms. Hu, she wanted her students to become citizens who uncritically abided by laws. Her students were treated largely as robots, passively reciting the textbook.

It would appear, therefore, that in these three cases a teacher's political orientation and subject matter knowledge did not have a major influence on his or her teaching style. What factors might account for this? Although I did not systematically collect data on all possible explanations, in the following section, I offer several potential explanations.

### **Explanations of the Similarity: Teacher-centered Instruction**

There are several factors that may help to explain why all three teachers adopted a teacher-centered instructional style: a lack of pedagogical content knowledge, traditional beliefs about the role of learners, and traditional beliefs about the nature of learning history.

Lacking pedagogical content knowledge of teaching history. Pedagogical content knowledge refers to the body of knowledge that enables particular content to be taught (Shulman, 1986; Wilson, Shulman, & Richert, 1987). This includes ways of representing and formulating a subject so as to make it comprehensible to others.

Therefore, pedagogical content knowledge also includes an understanding of the common conceptions that students share and the common areas of difficulty that students encounter in learning a given subject.

All three participants mentioned that they had difficulty teaching history to fourth graders. While teachers generally have a certain level of understanding of the subject matter that they are teaching, they do not necessarily understand how to teach the subject matter to students on different levels. Despite her confidence in teaching social studies by adopting a “constructivist approach,” Ms. Chen said that she was not a specialist in teaching history and she did not feel comfortable teaching history to her fourth graders (Chen, Post-I # 4, 12/8/97). Ms. Chen was not alone. During interviews, Ms. Hu frankly admitted that she taught students history in the ways that she intuitively felt “it may work.” Rarely, however, did she reflect upon how students would respond to her teaching. For her, teaching history was little different from teaching other subjects (Hu, Post-I # 8, 12/8/97). Mr. Lin also said that he experienced difficulty in “conveying the subject matter to fourth graders” (Lin, Post-I # 4, 12/17/97). He explained that most of the time he taught sixth graders, and he was used to talking with adults about Taiwan history in his study group. During my observations he was teaching fourth graders Taiwan history for the first time, and he found it very difficult to make the subject matter comprehensible to them.

Perhaps, then, the teachers lacked an understanding of the special conceptions and knowledge that fourth graders bring to the learning of Taiwan’s history. This lack of pedagogical content knowledge might contribute to the generation of a generic teaching style in which the teacher nominates the information that is to be learned and then

attempts to facilitate its memorization on the part of students.

Beliefs about learners and subject matter. A teacher's personal belief about subject matter and about how children learn that subject matter tend to shape pedagogical practices (Calderhead, 1996; Cuban, 1993). For instance, teachers with different beliefs about how students learn tend to create different types of classroom activities for their students.

All three teachers believed that history was difficult for fourth graders to learn. They saw history as too complicated and they believed that fourth graders are too young to learn it. As Ms. Chen explained:

History is about chronology, historical figures, and historical events. Learning history means memorizing all of the names and what happened to these people and especially remembering the sequence of events. I believe that this is very hard for fourth graders and they do not have the ability to recognize key information in the textbook. As a teacher, I need to take the responsibility to help them to catch the main points from the textbook and help them memorize them. (Chen, Post-I # 5, 12/22/97)

Ms. Hu concurred that history was a difficult subject for fourth graders since, according to her, they have not yet developed an ability to grasp the main points of a narrative. Ms. Hu assumed that her students needed help in highlighting important information. Mr. Lin saw history is a subject concerned with human cultural and political activities. He believed that fourth graders did not have sufficient background knowledge about humanity -- knowledge of concepts like democracy, politics, and sociology. Thus, "telling" students what happened in the past was the only effective approach to conveying the basic and most important information.

In sum, all three teachers concluded that fourth graders only had the ability to learn history through the process of memorizing factual knowledge. But how, exactly,

did they see the process of “learning history?”

Beliefs about learning history. Learning history goes beyond memorizing factual knowledge. Elementary students are capable of developing historical thinking that includes chronological thinking, historical comprehension, historical analysis and interpretation, historical research capabilities, and historical issues-analysis and decision-making (National Center for History in the Schools, 1994). Both Brown (1995) and Holt (1990) suggest that learning history is -- or should be -- much more than the simple learning of factual information. Students need to be given conceptual and procedural tools so as to be able to examine for themselves the accounts provided in the texts and to learn how the accounts were constructed. Husbands (1996) and Reed (1989) suggest that learning history means making sense of the past through an interrogation of the evidence.

Clearly, none of the informants held a similar conception of learning history, especially on the part of younger children. The three teachers in this study possess another view of learning history: the simple acquisition of factual knowledge, including memorizing significant events, people, and societies, and explanations of factors’ influences, consequences, and causes.

Ms. Chen and Ms. Hu emphasized that learning history is important for students so as to be able to remember the substantive knowledge provided by the textbooks.

According to Ms. Chen, for example:

Learning history is a question of learning facts about what happened in the past. Historical texts have recorded those facts and we study historical texts to learn about historical information. (Chen, Post-I # 14, 1/15/98).

Ms. Hu also emphasized the idea that students need to acquire the factual knowledge that is provided in the textbook and the importance of the information that she highlighted for

students, such as chronology, people, dates, places, and events. She believes that providing that information is fundamental to the learning of history.

Although Mr. Lin is fully aware of the interpretative nature of history, he also stresses that, at least for fourth graders, learning history is mainly the learning factual knowledge. The “facts” that Mr. Lin encourages students to learn are the “true” interpreted by a Taiwanese-centered perspective instead of the “false” ones provided by the textbook.

All three teachers generally emphasized a chronological sense of past events. There is no doubt that chronology is one important aspect of learning history. But developing a sense of historical time involves more than recalling the dates of certain important events. It also involves learning about concepts such as change, continuity, development, progression, and regression (Lomas, 1990). These three teachers, however, generally emphasized dates to the exclusion of anything else. Ms. Chen claimed that memorizing the chronology of history represents the core of learning history:

Learning history involves memorizing the time in which certain events and historical figures are embedded. Knowing chronology is a basic component for demonstrating what you know about history. If students mistake the era that Cheng Cheng-kung lived in for the era that Liu Ming-chuarn lived in, can you say that they know history? (Chen, Pre-observation I # 13, 1/14/98)

Ms. Hu held the same view:

Without exactly remembering the dates on which the given events took place, the sequence of a series of events on a timeline, and the era in which the given people lived, one cannot say that he/she learns about history. Chronology is the basic element of learning history. Without a time frame, students have difficulty organizing what happened in the past (Hu, Post-I # 4, 12/19/97).

Similar to Ms. Chen and Ms. Hu, Mr. Lin also emphasized the importance of learning about chronology in learning history:

Students' learning the chronology of Taiwan's history is the first step of "knowing" Taiwan history. If students cannot make clear the era when historical figures lived, I would say that they do not learn history at all. Learning chronology is the basic knowledge for learning history. (Lin, Post-I # 8, 1/8/98)

Lomas (1990) suggests that there are a variety of strategies that help students to develop a sense of historical time, including the use of artifacts to do sequencing exercises, introducing personal and family timelines, and creating a narratives from unstructured evidence that is organized in chronological order. Researchers have also found that the use of visual images to present historical, chronological data such as a timeline or a record of social action, (e.g., a piece of writing, a photograph, picture, film of video) are highly effective in developing students' chronological understanding of history (Levstik & Barton, 1996 a).

These three teachers, however, only used timelines in limited ways prescribed by their curricular materials. Because they focused on memorizing dates and historical eras, they only used assignments provided by the workbook to help students remember important dates and people. The assignment in question was a fill-in-the-blank timeline. Students were given events and persons and were asked to fill in the dates. Another timeline assignment asked students to fill in other events and persons in their correct chronological order. No other assignments or approaches -- such as studying family history -- were used to help students develop their chronological thinking.

In sum, the three teachers displayed a great deal of similarity in their teaching styles perhaps because of their insufficient grasp of pedagogical content knowledge, their beliefs about what fourth graders can (or cannot) learn, or their beliefs about learning history in general. Of course, one could entertain alternative hypotheses, including attending to structural factors within the context of the Taiwanese school system.

Teachers are usually given 35 to 40 students in each class. To cover the textbook material during scheduled school hours is regarded as an important obligation for teachers in Taiwan. Moreover, despite the fact that there is no requirement for elementary students to take an entrance examinations to enter middle school, both parents and teachers still focus on students' achievement on examinations, as they are concerned about their children's performance on future examinations that use textbooks as primary resources. Also, the teachers' prior experiences as students in Taiwanese classrooms, where their teachers enacted teacher-centered instruction, also serves as a powerful factor in the determination of their own teaching styles (Lortie, 1975). For the most part, these teachers have never experienced a teaching style that is different than what they experienced as students themselves. In the case of Ms. Chen, for example, although she attended a workshop where teacher educators demonstrated a constructivist approach to the teaching of mathematics, her own interpretation of constructivism is, at best, a synthesis of her traditional teaching adjusted towards the accommodation of more student questions.

These three teachers clearly demonstrate that the differences, confusions, and debates about national identity in the larger context of Taiwan find their way into classrooms, even in the face of calls for continued curriculum reform. Each teacher leaves a thumbprint on the state-mandated textbook. The character and intensity of this fingerprint is largely a product of their level of knowledge of the subject matter, their political ideologies, and their beliefs about learners and learning.



## **CHAPTER SEVEN**

### **LESSONS LEARNED**

The purpose of this study has been to describe and explain each of the three teacher's national identities, subject matter knowledge, and how these factors influenced his or her teaching. One especially important aspect of this study has involved a search for a better understanding of how social studies curricula have been used by the KMT government to promote a Chinese identity. Recent political trends, especially increasing democratization, have led to changes in the goals of social studies curricula. Now, even according to official policy, schools -- as the rhetoric goes -- are to be devoted to the task of educating students to become participating citizens who are able to think critically and independently and participate freely in democratic society.

Two primary -- and apparently contradictory -- results emerged from my analyses. One is that the national identity of each teacher led him or her to learn the subject matter of instruction in a selective fashion, adding or emphasizing certain themes that were commensurate with the advocacy of his or her own national identity. In other words, each teacher's learning and teaching of Taiwan history was filtered through the lens of his or her own political orientation and national identity.

Another important finding of the study was that no matter what national identity each teacher held, and no matter what knowledge of the subject matter each possessed, all of them taught in the same way. There appeared to be little to no influence of a teacher's national identity and subject matter knowledge on his or her pedagogical style. All three teachers appeared authoritative and dominating, focusing on indoctrination rather than encouraging students to think critically. All tended towards persuasion, believing that

students should accept the teacher's view of national identity through didactic teacher-centered instruction, even though none of the teachers appeared to be consciously aware that they were engaging in the ideological indoctrination of students.

Of course, this study is highly limited. I only spoke with and observed three teachers. And, I make no claim about the generalizability of these cases. Instead, I argue only that these three teachers are representative of the variety of ideological world-views held by social studies teachers in Taiwan. In this regard, it seems appropriate to ask two questions. What special challenges are faced by teachers who shoulder the task of an education to citizenship in Taiwan, a nation with no clear-cut or any singular national identity? What hypotheses might we offer to help to explain the results of this study?

As I see it, there are three challenges of special relevance that are faced by teachers in Taiwan as the country continues its march towards increasing levels of authentic democracy. In what follows, I discuss these challenges and the critical role of the social studies teacher in the progression beyond authoritarian culture in the Taiwanese classroom. Next, I discuss how each teacher's subjective national identity serves to constrain his or her own learning processes and ability to teach in such a way that takes into account the multiple perspectives that exist concerning Taiwan's history -- in a society undergoing a rapid process of reinventing itself. In the third section, I discuss how the situation in Taiwan might accurately be seen as another version of the "culture wars" that have erupted in Great Britain, South Africa, Russia, and the United States. With respect to academic conflict in Taiwan, the most critical question faced by teachers seems to center on the issue of whose facts constitute historical knowledge. In conclusion, I briefly discuss the implications of this study for curriculum reform, teacher

education, and related educational research.

**Challenge One:  
The Role of Teachers In the  
Transformation of Authoritarian Culture**

Dewey (1966) considered education to be a “social process,” noting that the meaning of education is defined by the kind of society one has in mind. As Taiwan becomes increasingly democratic, therefore, the educational system must shift as well, from an authoritarian to a democratic one. As a result of this process of democratization, social studies teachers are beginning to be asked to change their teaching styles, to act as facilitators, helping students to develop their capacities for critical and independent thinking. As suggested by this study, however, teachers continue to indoctrinate students, treating them as passive objects who must obey their teachers without question. Clearly, for all three of these teachers, realizing an alternative view of education in Taiwan would be an arduous process. Old habits die hard, especially in highly traditional societies.

Before we describe the challenges faced by teachers in the transformation of an authoritarian classroom culture into a democratic one, however, we need to define the concept of a “democratic citizen.” For Engle and Ochoa (1988):

The democratic citizen is not only to be understood merely in the classic “good citizenship” sense of one who is patriotic, loyal, and obedient to the state; rather, the good citizen is also critic of the state, one who is able and willing to participate in its improvement (p. 3).

They go on to add that a democratic citizen must be a skilled and responsible decision-maker, a participant who can “judge the credibility of various claims to truth.” (Engle & Ochoa, 1988, p. 8). In addition, being a democratic citizen involves respect for the feelings and opinions of others (Engle & Ochoa, 1988).

Considering the goal of making democratic citizens, Engle and Ochoa (1988)



argue that citizenship education should simultaneously consist of socialization and counter-socialization. Socialization is seen as a conservative process with the express purpose of transmitting reasoned values, democratic culture, and appropriate behaviors. According to this perspective, however, this socialization process must be balanced by counter-socialization, which emphasizes the development of independent critical thinking and problem solving. Parker and Jarolimek (1984), for example, claim that “classrooms cannot operate as dictatorships in which the highest virtues are obedience, submission, and conformity” (p. 37), and they describe a democratic classroom as one in which students are provided with opportunities to express their concerns and preferences for procedures, content, and the arrangement of the classroom. In such classrooms, students are encouraged to express their opinions concerning controversial issues, and teachers model respect for diverse student opinions (p. 38).

Research on classroom climate has found that when students learn in classrooms where teachers respect students’ ideas and provide opportunities for students to express their views about controversial issues, students tend to be more tolerant of other students’ opinions (Dawson & Prewitt, 1969; Ehman, 1980; Leming, 1985). Dewey (1966) noted that, “democracy is more than a form of government; it is primarily a mode of associated living, of conjoint communicated experience” (p. 87). To form a community where people are allowed to express their own opinions and exhibit concern not only for their own well being but also that of all those who live in the community. Citizenship education in Taiwan, in particular, needs to foster students’ commitment to and ability to live under and participate in Taiwan’s nascent democracy. This includes engendering tolerance and respect for alternative opinions, questioning the validity of alternative

claims, and participating in the process of policy making.

Dewey (1966) argues that the key to transforming a society lies in transforming the consciousness of its citizens, and that this can be accomplished through education. However, in the context of Taiwan, reformers who want to teach students to be democratic citizens pose a great challenge to teachers. Two factors, in particular, contribute to the challenge faced by teachers in terms of their role in transforming an authoritarian educational system and culture into one that is suited to a democratic society. First, generally speaking, Taiwan remains an authoritarian culture. Second, teachers were educated under an authoritarian culture when they were students, and this experience tends to have a negative impact on their ability to develop a capacity for the implementation of more progressive forms of instruction. Teachers are not able to teach in ways that they have never seen modeled for them.

Although the Taiwanese government claims to have fully embraced democracy, it remains a largely authoritarian society, both politically and culturally. The Ministry of Education, for instance, still rigidly controls the educational system. The government assumes many roles in education, such as controlling required curricula in teacher education programs, universities, and in secondary and elementary education. In addition, teachers have been categorized as public servants who are subject to the authority of governmental regulations. This authoritarian culture is particularly prominent with respect to the role of the Ministry of Education. In April of 1994, for example, a grass-roots 4/10 educational reform movement (in which over a thousand citizens took to the streets) requested that the government liberalize the educational system by improving teachers' autonomy, permitting the formation of a nationwide



teachers union, and promoting students' rights. The KMT government issued a mandate, which was to last until June of 1999, which surrendered some of the government's control over the educational system to local communities, parents, and teachers. Generally speaking, however, citizenship education in Taiwan pays more attention to citizen's obligations to pay taxes, obey laws, and vote, than it does to encouraging citizens to become participants in the development of public policy.

In an authoritarian culture such as that of Taiwan, where emphasizes passivity and obedience are seen as central imperatives, few teachers have a clear image of what it means to be a democratic citizen. In this study, both Ms. Chen and Ms. Hu assumed that good citizens should not challenge the government. When asked her opinion about the official textbook, Ms. Hu noted that the textbook was produced by the government, therefore, as a teacher, she would not criticize the textbook even if someday the opposition party became the ruling party and issued textbooks in which the idea of Taiwanese independence was promoted. In addition, Ms. Hu considered the primary goal of social studies education to be the education of citizens to be obedient to laws so as to maintain a harmonious society.

Ms. Chen, like Ms. Hu, was highly supportive of the government. She stridently defended the KMT and criticized the opposition, refusing to tolerate any opinion critical of the KMT. Although Ms. Chen claimed that she considered the primary goal of social studies education was to make students critical thinkers, she did not allow students in her classroom to hold views that differed from her own.

By contrast, Mr. Lin was highly critical of the state and was himself an active participant in social movements. However, when it came to tolerating views that were





different from his own, he is similar to the other teachers. Clearly, all three teachers are lacking with respect to the development of democratic impulses towards citizen education and free and open student discussion.

Dewey accused authoritarian education of engendering attitudes of “obedience, docility, submission, and passivity” in students (Raywid, 1980, p. 3). Authoritarian education is centered on the indoctrination of students. Dewey (1937) defined indoctrination as: “The systematic use of every possible means to impress upon the minds of pupils a particular set of political and economic views to the exclusion of every other” (p. 238).

From the 1950s through the 1980s, the content and purpose of schooling in Taiwan has represented a form of authoritarian education. According to Young (1994), who conducted a series of research studies on textbook content in Taiwan, the themes in textbooks used in elementary and middle schools often promoted loyalty to Chiang Kai-shek and the KMT government. Obedience and authoritarianism were two essential themes that reoccurred throughout the textbooks. Teachers’ classroom practice also encouraged students to act passively and respect the authority of groups. Wilson (1970) also observed classroom life in Taiwan during 1960s: “Training in respect for authority is a part of school life at all levels. Criticism and questioning of the teacher, even the most simple problems, is not encouraged and is hardly ever observed” (p. 74).

Wilson (1970) also claimed that Taiwan’s citizenship education involved considerable emphasis on duties and obligations: the duty to serve one’s country and to pay taxes, and the obligation to be loyal and unquestioning. He found that for children in Taiwan, the emphasis on duty and obligation “has been internalized and generally

overrides notions of individual rights and freedoms” (p. 167). Borrowing from Almond and Verba’s (1965) notion of civic culture, Wilson (1970) argued that Taiwan’s civic training primarily focused on the development of “subject competence” rather than “citizen competence.” This concept of citizen competence refers to “competent citizens [who have] a role in the formation of general policy.” By contrast, subject competence “is more a matter of being aware of one’s rights under the rules than participating in the making of the rules” (Wilson, 1970, p. 167). Wilson indicated that one contribution of the educational system in Taiwan was to “reinforce a congruence between styles of authority in primary groups and those that exist between citizens and political leaders.” The role of teachers in the promotion of this type of authoritarian education was considered critical to political control:

Knowingly or unknowingly, the patterns of authority that have been taught have been conducive to political stability. . . . educational development has been characterized by a great mass of teachers cooperating effectively in inculcating in children support of the government” (p. 146).

In sum, almost all teachers in Taiwan were educated under an authoritarian system. They observed their own teachers acting as sole authorities; as students, they learned to be obedient and not to question the teacher. Based on my classroom observations, this pattern of classroom practice remains in place.

Researchers have analyzed the way in which teachers spend a long period of time as student teachers or apprentice observers. This apprenticeship observation proves to be a powerful force that influences their subsequent classroom practice (Feiman-Nemser, 1995; Kennedy, M. M., 1991; Lortie, 1975). Kennedy, M. M. (1991) notes that:

From their experience as students they form views about the nature of school subjects, about the teacher’s role in facilitating learning, and about the pedagogical implications of learner diversity. These views constrain their ability



to grasp alternative views” (p. 6).

If reform-oriented education policies do not take teachers’ prior experience with an exclusively authoritarian education into account, it is unlikely that teachers will readily change their practice from the traditional form to a more democratic one. But it is not only their apprenticeship observation within an authoritarian education system that has influenced how and what these three teachers taught. The school system is not the only place where this authoritarian culture exists, it is entrenched outside of the school system as well; in fact, it permeates Taiwanese society. In the democratization process, then, schools are placed in the most challenging position of needing to re-create culture itself, so as to change the larger society. This is an overwhelming challenge, and one that can only be met over a substantial period of time.

#### **Challenge Two:**

#### **The Subjectivity of National Identity as a Constraint on Teachers’ Learning and the Teaching of Multiple Perspectives Concerning Taiwan’s History**

I was able to observe the way in which all three teachers selected and focused on themes that closely reflected their own sense concerning national identity. They brought their own personal political orientations into their classrooms and used them as frames of reference for their interpretation and use of the textbook. All of them appeared ideologically committed to what they were teaching. Mr. Lin wanted to teach students to think of themselves as Taiwanese, while Ms. Chen and Ms. Hu sought to teach students not to forget their Chinese roots. It appears that all three teachers seemed to be -- perhaps unconsciously -- governed by their personal ideologies, unable or unwilling to consider and tolerate alternative views of Taiwan’s history.

The subjectivity of national identity in each teacher also functioned -- I believe --



to dominate what they learned concerning the subject matter of Taiwan's history. Ms. Chen, for example, was exposed to an alternative view of Taiwan's history by a teacher educator who was a Taiwanese nationalist, when she took a class in an in-service program in 1996. The class was concerned with pedagogy and the instructor occasionally revealed his Taiwanese consciousness. He argued in class that Taiwan's history includes a variety of political eras and one of them is represented by the control of the ROC. He argued, therefore, that the history of the ROC should be understood as a limited part of Taiwan's history. Ms. Chen appeared upset when she recalled this class, and she criticized his idea as "completely incorrect":

His ideas failed to reflect the historical fact that Taiwan has been a province of China since the Ching dynasty. Why does he deny the fact that Taiwan's history is part of Chinese history? He is an extremist who advocates Taiwanese independence. We all knew that his ideas were incorrect but we did not argue with him because he was our instructor, who controlled our grades (Chen, I # 3, 11/24/97).

To cite another example, when Ms. Hu talked about the 2/28 incident, she mentioned that her father had told her about this incident. She went on to say that if she had asked her maternal grandfather about the 2/28 incident, she would have heard another story. However, she believed that her father's account was the accurate one:

He [my maternal grandfather] is *Tai-wan rern* (native Taiwanese) and, of course, *Tai-wan rern* hold a different view about the 2/28 incident from that of mainlanders. I knew that, so I did not ask my maternal grandfather about that incident. I only believe my father's account about that incident" (Hu, I # 3, 11/24/97).

These two examples illustrate how their own understanding of national identity limited what these two women teachers learned or came to know about the subject matter that they taught. Likewise, Mr. Lin appeared highly impassioned in the presentation of "facts" to his students. For instance, when he taught students about the Anti-Japanese





War, he told them that the war was their history but not our history since the war did not take place on the island of Taiwan. Mr. Lin failed to acknowledge the significance of the war to the lives of the mainlanders in China before they fled to Taiwan in 1949.

Researchers Ball & McDiarmid (1990) conceptualized subject matter knowledge as knowledge of and about a given subject. Specifically, history teachers not only need to learn the content of history, such as the accounts of historical events, historical figures, explanations and causes of events, the evolution of societies, and historical chronology, but also the various interpretations of this historical information, based on different ideological perspectives. Historians have generally argued that history is socially constructed and historical knowledge always involves interpretation (Carr, 1964; Jenkins, 1991; Holt, 1990; Levstik & Barton, 1996 b). Thus, researchers (among them Ball & McDiarmid, 1990 and Wilson & McDiarmid, 1996) suggest that history teachers need to develop competing views of the nature of history. When teachers hold multiple perspectives concerning varying accounts of history, as these researchers argue, they are then able to provide greater opportunities to students to become familiar with history as an on-going debate and to understand how it represents a socio-historical construct (Levstik & Barton, 1996 b; Wilson & McDiarmid, 1996). Oliver and Shaver (1966) claim that teachers who have the capacity to cultivate a democratic spirit in students and to create a democratic classroom environment must be

open to the exploration of ideas; be able to think in other than categorical terms; able to tolerate the conflict of ideas and ideals; able to recognize values embedded in controversies; have a tentative, probabilistic view of knowledge.  
(cited from Leming, 1991, p. 224)

My analysis suggests, however, that it would be extremely difficult for these three teachers to develop multiple views of relevant historical interpretations. Their subjective



and impassioned views of national identity constrain their ability to learning about, understand, and articulate multiple accounts of Taiwan's history. Each teacher resisted recognizing alternative accounts. Ms. Chen insisted that there was only one appropriate version or interpretation of Taiwan's history -- that of a Chinese-centered perspective. Ms. Hu resisted even listening to alternative accounts of the 2/28 incident because they were provided by the political opposition and Taiwanese nationalists. Mr. Lin was so intent on helping students see what they had not historically been shown that he also tended to turn a blind eye towards those versions of history that he did not personally endorse.

It is quite understandable why each teacher possesses his or her own view of national identity -- it is rooted in their heart and soul. Teachers need to develop a more objective stance, however, so as to assist students in learning history in such a way that they are able to draw their own conclusions. If teachers do not reflect on their own subjectivity and the way that this influences their learning of alternative accounts of Taiwan's history, then they will be seriously limited in their capacity to create democratic classrooms.

Each teacher's bias is reflected in the way that they reacted to students' alternative opinions. All three teachers followed an authoritarian pattern of instruction. Both Ms. Chen and Ms. Hu denied the validity of students' ideas concerning the claim that their ancestral home is in Taiwan. Both insisted that students adopt the KMT's view concerning the ancestral homeland. Mr. Lin was equally authoritarian: he wanted students to parrot his description of the geological location of Taiwan on the map. Oliver and Shaver (1966) suggest that teachers who are able to incorporate controversial issues



into their classes must, “perceive students as rational human beings with the right to be involved in decision making, value student opinions, and be willing to interact freely with students in an exchange of ideas (cited from Leming, 1991, p. 225). However, the valuing of students’ ideas and the free exchange of alternative views were not present in any of the classrooms that I visited.

A conflict is encountered here between the normative view of an effective teacher as presented in the literature and the empirical accounts presented here. Ideally, as scholars argue, teachers should possess an awareness of multiple perspectives concerning historical realities and try to maintain an objective, non biased, position concerning history and its controversial issues. My field study suggests, however, that a teacher’s subjectivity -- as shaped by their national identity -- may limit their intellectual orientation towards the subject matter and their capacity to value and respect students’ opinions. I do not mean to suggest that teachers should not bring their own views of national identity into the classroom; it would be dishonest to assert that one’s stance was entirely objective concerning national identity. Nor do I believe these three teachers intended to brainwash their students. The teachers’ passion and patriotism for his or her country is understandable. However, if Taiwan is to become democratic -- to accurately reflect the plurality of political and cultural viewpoints that already exists -- teachers are of essential importance to fostering that democratic culture, a culture that would allow students to develop a diversity of political orientations and, at the same time, to respect the different opinions of others. This study suggests that, to reach the ideal of democracy in schools, teachers must face up to the challenge of their own subjectivity, a subjectivity that serves to constrain one’s capacity for helping to create this new democracy.

**Challenge Three:**  
**In the History Wars: Whose Facts Constitute Knowledge?**

Over the past two decades, academic debates, often described as “wars,” have broken out around the world. In these debates, educational philosophy and practice has come under increased scrutiny. One issue that is fundamental to these debates concerns identity and collective memory. What books should students read? Whose history should students learn? In answering these questions, other questions are raised as well: What is the purpose of teaching history in schools? What is required for the education of a democratic citizen?

Great Britain. The core of the academic culture wars in Great Britain centers around two questions: Whose history should be taught? And to what national purpose? Conservatives have argued that, “the national memory, what makes Britain British,” should be taught in schools (Nash, Crabtree, & Dunn., 1998, p. 142). As they see it, teachers should teach students about the country’s proud heritage because those collective memories will make children loyal and patriotic. “Educationists,” on the other hand, have emphasized the importance of the skills of learning history and the progressive methods needed to cultivate students’ critical thinking and ability to evaluate historical evidence (Nash, Crabtree, & Dunn, 1998). Conservatives disagree, placing greater emphasis on the acquisition of content knowledge. They worry that, if students focus on studying issues of evidence and analytic reasoning, they will graduate with an insufficient knowledge of the content of their country’s history.

Others’ opinions emerged as well. One group argued that British history should be increased from 40 to at least 50% of the history curriculum and, for the rest of the



time, students should learn world history. In response, Welsh, Scots, and Northern Irish complained that the curriculum was “much too English” (Nash, Crabtree, & Dunn, 1998, p. 141).

South Africa. Similar debates arose in South Africa. Since the majority black population came to share power in 1994, educators have argued that students should learn a new history written especially for them. Debates ensued:

Should each racial and linguistic group -- Zulu, Xhosa, Venda, Afrikaner, English -- have its own history in order to preserve and celebrate particularist cultural traditions? Should history be put into the service of multicultural nation building, emphasizing the unity and harmony of all, even though such an approach might involve a degree of indoctrination? Should history focus on critical skills, training students to nurture the new democracy by questioning the political and social values of the new South Africa as much as the old? (Nash, Crabtree, & Dunn, 1998, p. 132)

Although no consensus has been reached, a new textbook was issued in 1997 that radically changed the account of South African history that had previously been taught. For instance, in the old textbooks, South African history started with the arrival of the first white settler during the seventh century. In the new textbook, South African history begins many centuries earlier. Furthermore, the first white man to arrive in South Africa is no longer portrayed as a hero (Nash, Crabtree, & Dunn, 1998). In addition, the new texts encourage students to engage in critical thinking and creative discussions, rather than supporting traditional didactic instruction.

Russia. Similar arguments emerged in Russia. When the Soviet Union collapsed, history educators in Russia and in the other new states had to confront the problem of presenting their past in textbooks. Marxist-Leninist ideology was removed from official textbooks by the Russian government in 1994, and the Russian Education Minister declared that the new textbook would foster in students “an ability to analyze and to



make independent decisions . . . the opposite of what we had before” (Nash, Crabtree, & Dunn, 1998, p. 130). However, critics attacked the new textbook history for “being insufficiently patriotic, for failing to teach young Russians to love the motherland, and for dwelling on grim and gloomy crimes and the repression of the Stalin era” (Nash, Crabtree, & Dunn, 1998, p. 131). Critics accused the new textbook of being “too pro-America, laud[ing] capitalism, dwell[ing] too much on odious chapters of the Soviet past” (Nash, Crabtree, & Dunn, 1998, p. 131).

The United States. The center of the academic culture wars concerning history education in the United States over the last 20 years has concerned multiculturalism (Cornbleth & Waugh, 1995; Nash, Crabtree, & Dunn, 1998). In a country comprised of diverse ethnic and racial groups, U. S. educators and policy makers have had heated debates about both whose history should be taught and why. Politicians, historians, the media, and curriculum makers have all joined in the debate. Some insist that each ethnic group should be given a place in U. S. history; others are more concerned with communicating America’s “glorious” past. They argue that knowledge of events and people should be taught to keep the United States unified as a country with a single collective memory (Cornbleth & Waugh, 1995).

Voluntary national history standards were made public in 1994. The standards emphasized active learning and critical thinking, recommending five categories of historical thinking: chronological thinking, historical comprehension, historical analysis and interpretation, historical research capabilities, and historical issue analysis and decision-making (National Center for History in the Schools, 1994). In addition, the standards encouraged students to use primary documents to learn how historians use and

evaluate evidence -- this includes the use of a range of resources, including the arts, music, literature, and architecture.

Controversy erupted immediately. Critics attacked the standards for being too politically correct, for not adequately recognizing the importance of great historical figures, and for placing too much emphasis on women and minority groups. Some charged that the new text “undermined students’ patriotism, pulled down cherished heroes, and even threatened national security” (Nash, Crabtree, & Dunn, 1998, p. x). Yet many teachers showed their support of the new standards by adopting them, embracing their spirit, and bringing new ideas into their classrooms. Students in such classes engaged in discussion and debate, reading primary documents and analyzing alternative accounts (Nash, Crabtree, & Dunn, 1998).

Clearly, many countries have recently experienced great strife concerning the content and pedagogy of history education. Some people, eager to use history as a vehicle to transmit a certain ideology or set of values such as nationalism and multiculturalism, prefer to select content that supports their ideology. Moreover, as long as history education has as a primary educational goal the fostering of national identity, it is inevitable that debates will erupt concerning the role of historical facts and critical thinking skills concerning history. Debates continue over the cultivation of what memory best suits or is best able to serve the nation’s young.

Nash and his colleagues (1998) noted that these culture wars only break out in democratic countries. In authoritarian states, ruling parties control their own definitive version of history and impose that history on schools. Only in a democratic society can politicians, educators, historians, and the public challenge what constitutes “official

knowledge.” The story of Taiwan supports this hypothesis. Even in Taiwan, where the government strictly controls a centralized education system and textbooks, conflict has ensued over the proper way to teach history -- and this conflict is clearly a product of the democratic opening.

Taiwan. Like the culture wars in other countries, the core issue in Taiwan concerns national identity and the teaching of collective memory. Starting in 1997, seventh graders (the first year in middle school) were required to take a new class called “Knowing about Taiwan,” a course concerning the island’s history, geography, and society. In June of 1997, new textbooks for the course were drafted and sent to publishers. The textbooks included discussion of many sensitive topics that had never previously appeared in textbooks, like the 2/28 incident and the “white terror” -- the KMT’s intimidation campaign of the 1950s and the 1960s. In addition, the account of Taiwan’s history started with the early aboriginal settlements on the island and ended with the struggle for democracy and the political and social changes that have occurred since martial law was lifted.

After reviewing a sample of the new textbooks, New Party politicians called for the Ministry of Education to eliminate them. Chinese nationalists condemned the textbooks as a tool designed for paving the way to Taiwanese independence. They argued that the content stimulated “pro-Japanese and anti-Chinese” sentiment in students (China Times, June 5, 1997; Association for Studying Taiwan History, 1997). Critics also charged that the textbooks did not authentically represent historical “facts.” A legislator of the New Party claimed that the textbook intentionally emphasized contributions made by the Japanese to the agricultural and industrial development of

Taiwan during the Japanese colonial era, while toning down the fact that the Japanese killed more than ten thousand Taiwanese people. He further argued that certain highly significant historical facts should be incorporated into the new textbooks, such as the fact that during the Japanese occupation Sun Yat-sen set up a local branch of the KMT in Taipei. The legislator condemned the textbook authors for omitting the connection between Taiwan and the mainland, arguing that the textbooks told students “too much” about the 2/28 incident. Knowing too much about the incident, he said, was not conducive to the development of teenagers’ positive view of their country. Protesters also condemned the use of certain terminology. They argued that the term *Tai-wan rern* (Taiwanese people) should not be used to indicate people on Taiwan; rather, as they saw it, the term *jung-kuor rern* (citizens of China) would be more appropriate. One historian with an expertise in Chinese history worried that his grandson (who would soon be a seventh grader) would be “poisoned” by the textbook. Another professor of Chinese literature at the National Taiwan University warned that the use of the textbooks would be a “disaster.” She was relieved, however, that her own child would be able to avoid using it (China Times, June 5, 1997).

In response to the protests, the Minister of Education announced that, if the textbooks did not present historical “facts,” the authors should reexamine and revise the draft. He then asked the NICT (National Institute for Compilation and Translation) to temporarily suspend the printing of the new textbooks (Freedom Times, June 6, 1997).

A compilation committee chairperson, an historian from Academia Sinica (Taiwan’s most prestigious research institute), publicly criticized the Minister for his soft tone. The historian argued that the NICT had anticipated that the new textbooks would

be controversial and had tried its best to produce a textbook that took an objective position in presenting historical facts. Rejecting a New Party legislator's invitation to have a face-to-face debate, he told journalists:

I am a scholar and I welcome discussions based on rationality rather than politicization. If they (protesters) could provide evidence to support their argument I would be able to accept their ideas. However, those protesters are politicians who hold a certain political ideology. As long as they criticize the textbook from their own political stance, it is impossible to reach a reasonable consensus about the textbook content through debates (China Times, June 6, 1997).

The NICT director supported the chairperson, noting that the committee was composed of two dozen historians, scholars, teacher educators, and middle school teachers. In order to keep textbook content as objective as possible, the committee members were selected on the basis of the fact that they held different political stances. According to the director, the committee took two years to create the new textbooks, including more than thirty NICT meetings and countless other meetings with school teachers.

But the NICT is subject to the mandates of the Ministry of Education, and, so, the director obeyed the Minister of Education's order and asked the committee to reexamine the controversial points raised by critics. At the same time, however, the director noted that the NICT would fully respect the committee's final decision.

Newspapers and TV talk shows were full of debate about the new textbooks. The focus of the debates was not, however, on issues of pedagogy or historical thinking. Rather, discussions were concerned with what should be taught and what information does (or does not) represent historical "facts." On June 18, 1997, the NICT director attended a meeting hosted by the Minister of Education. At the meeting, she received no



support from Ministry officials and found herself under fire. A senior official charged that:

When I read the newspaper, I was so angry that I couldn't help shivering . . . . How can we afford to have these kinds of textbooks? It is not your place to improve academic thought when you produce textbooks. Textbooks are not academic things; textbooks are to serve to guide students to better understand the government's policy and that's all (China Evening Times, June, 25, 1997).

It is important to note how these debates concern the role of school knowledge in the socialization of students, not the question of exposing them to scholarship. In response, the NICT director revealed to the press that she would resign from her position after the new textbooks were published. In the days that followed, the NICT and the textbook committee received verbal threats (including blackmail) (China Evening Times, June 23, 1997). The committee responsible for the development of the volume on Taiwan's history appealed to the public to be "rational," to carefully examine the textbook content, and not to overly politicize the debates over the textbook. A textbook editor noted, "We want students to see things in a realistic way. We don't want to favor one point of view over another " (Baum, 1997, p. 26).

While the critics tended to have a pro-Chinese unification stance, supporters of the new textbooks were, for the most part, Taiwanese nationalists. One hundred and eighty five university professors and more than 30 legislators signed a statement that appealed to the society: "Please do not deprive our children of the right to know about the land in which they live" (China Evening Times, June 23, 1997). The NICT director told reporters that unless the Ministry of Education officially gave an order to suspend the use of the textbooks in the coming school year, she had the responsibility to make the textbooks available to students and teachers (China Evening Times, June 25, 1997).





On July 4, the last draft of the textbook was eventually sent to the publishers. This time, the Ministry of Education kept silent, but the debate continued. On July 7, more than 100 protesters demonstrated outside of the Ministry of Education, objecting to the new textbook. One week later, a group of supporters went to the Ministry of Education, asking the Minister not to cave in.

While several changes were made in the final revision process, the committee ignored many other objections. For instance, the committee retained the usage of *Taiwan rern* rather than *jung-guor rern*. On the other hand, the committee did make an important compromise; they toned down a description of the *Mei-li-dau* incident in 1979, and the final draft portrayed it as “a most influential event in Taiwan’s democracy movement,” replacing the previous description of “the most cruel crackdown after the occurrence of 2/28 incident” (China Times, July 4, 1997).

In summary, the academic battle over how to teach history in Taiwan appears to have been primarily concerned with the teaching of nationalism and what constitutes historical fact. The appearance of a new curriculum invited discussion and debate over the textbook content among politicians, textbook editors, historians, and scholars concerning what kind of historical facts should be taught. The body of historical knowledge that it was seen as necessary to teach was defined differently, depending on the sense of national identity that one held. As one scholar noted: “This is a war between two political ideologies: Chinese nationalism versus Taiwanese nationalism” (Contemporary, August 1, 1997, p. 66). The debates on textbooks were highly politicized. The participants were not arguing about which pedagogical strategies to use to educate democratic citizens; rather, they worried about what facts should be selected



as legitimate textbook knowledge. Nash and his colleagues (1998) note that such debates are inherent to democracy, but they warn of the cost of politicization:

Lively debate over the meaning of the past and its relation to today's affairs does not signal national disunity and deterioration; rather, it is a sign of a vibrant democracy. On the other hand, when these debates become rancorous and politicized, they threaten to impede the national mission to cure ourselves of historical amnesia (p. 272).

Another prominent feature of the debate in Taiwan was that there was no mention of the importance of historical thinking to history education. In fact, one professor in a history department who was on the textbook committee explained that the primary educational goal of the new course is to introduce a body of historical knowledge, rather than to teach students to understand the interpretative nature of history:

History can be interpreted differently based on the different views that people hold. However, the sole purpose of this course (learning about Taiwan) is to help students learn about certain historical facts rather than helping them learn about the interpretative nature of history. (China Times, June 10, 1997)

Thus, unlike the debate in Great Britain and the U.S., where some arguments concern issues of process versus content, the debate in Taiwan has little to do with the teaching of historical analysis and interpretation skills and has been much more focused on the question of, "Whose facts are to be included?"

After September of 1997, when middle school students began using the new textbooks, it appeared that the debate had been resolved. Yet this was not so. The debates continued, they were simply moved from the public arena, in the form of street demonstrations and newspaper articles, to classrooms, where teachers exercised their autonomy and selected which points from the textbook to emphasize, which to delete, and which to add. This study illuminates part of this story.

The three teachers in this study were not only observers of the "history wars,"



they were also actors, implementing their own personal preferences. Standing on the side of the Chinese nationalists, Ms. Hu believes that the new textbooks are problematic, that they provide “false information” to students:

Because the new textbooks do not fully represent historical facts, it is no wonder that so many people protested against the new textbooks (Hu, I # 2, 9/13/97).

By contrast, Mr. Lin appreciates the new textbooks:

I see the debates over the new textbooks as positive, because through the debates, teachers and parents began to realize the problem in our history education concerning the development of national identity. It is good that, eventually, our children will have an opportunity to study an alternative account of history which is different from what we studied (Lin, I # 2, 9/18/97).

The teachers in this study held considerable power over the transmission of a particular view of Taiwan’s history to students. Regardless of the uniformity of subject matter provided by the textbook, each teacher stressed different themes and content, depending on his or her national identity. Mr. Lin insisted on teaching history from a Taiwanese-centered perspective, while Ms. Chen and Ms. Hu wanted students to learn about their ancestral home (China) and the oppression of Japanese rule. Moreover, all three teachers emphasized the transmission of a body of knowledge rather than fostering inquiry and critical thinking skills such as raising questions, seeking and evaluating evidence, analyzing historical stories and records, and interpreting historical records. Each of them considered the primary educational goal of teaching Taiwan’s history to be the fostering of students’ sense of national identity.

In summary, as Taiwan becomes increasingly democratic, curriculum reformers have called for fostering critical and more independent thinking on the part of students. Researchers (Torney-Purta, Schwille, & Amadeo, 1999) indicated that, “the importance of the implicit or hidden curriculum has increasingly come to be recognized. Nearly

every discussion of education for democracy includes the contention that one must ‘practice what one preaches’ and, in particular, create a more democratic school culture” (p. 14). There is an international trend for debates concerning educational policy in the United States and other countries to also be concerned with the issue of civic education and the need to educate citizens for greater participation in the democratic process in the coming century (Cogan & Derricott, 1998; Hahn, 1998; Parker & Jarolimek, 1984; Torney-Purta, Schwille, & Amadeo, 1999). A normative image of citizenship education has emerged where the classroom is seen as a place where students should have debates, criticize certain stances, discuss controversial issues, and reexamine conflicting views of interpretations of historical realities. The pedagogical practices of the three teachers in this study, however, is not consonant with this normative view. Yet, these three teachers were recommended to me as outstanding examples of especially good teachers. Therefore, this field study also raises a question about the legitimacy of those normative claims and suggests that the school system in Taiwan has a very long way to go before these pedagogical imperatives can be recognized.

I must admit that I too wish for more democratic classrooms in Taiwan. And so I conclude this chapter with some ruminations on the implications of my study for pedagogical reform and teacher education in Taiwan.

### **Implications of the Culture Wars over the Teaching of History for Educational Reform**

The social studies curriculum reform in Taiwan of the 1990s calls for a democratic education to prepare citizens to be able to think critically and independently. To fulfill this educational goal, the way in which history is taught in schools has been and continues to be rigorously reexamined. There is no doubt that, without historical



knowledge and the inquiry that it generates, “one cannot aspire to the informed, discriminating citizenship that is essential to effective participation in the democratic process of governance” (National Center of History, 1994, p.1). The conflicts that erupted over the teaching of history, both in the debates over textbook content and with respect to the teaching of history in elementary social studies classrooms, have given rise to what I see as several especially important implications for educational reform. I begin with a brief review of American researchers’ assertions concerning the teaching of historical thinking skills in schools and I then move to the context of Taiwan where Taiwan’s scholars echo their U. S. counterparts.

Regardless of differences in context, the conflict generated over the teaching of history in Taiwan is similar to the U. S. case in several important ways. But, debates in the U.S. go beyond textbook content, and reformers argue that history education should focus on students’ abilities to develop historical thinking skills rather than solely the acquisition of historical knowledge. In response to policy-making concerning multicultural education in California, Kobrin (1992) argued that it was impossible to include everyone’s history in a textbook. From his point of view, the most important aspect of learning history is not only to learn a body of information that is represented by texts, students also need to learn the procedure of “doing history,” if they are to understand the extent to which historical knowledge is socially constructed. He asserted:

Studying history in schools should begin with learning the habits of the mind, the skills and the ways of thinking that produce legitimate historical generalizations, appropriately supported and documented from reliable resources. (p, 330)

Along with Kobrin, Graff (1992) describes the debates as “conflicts” and notes that “the academic curriculum has become a prominent arena of cultural conflict because





it is a microcosm, as it should be, of the clash of cultures and values in America as a whole” (p. 8). He argued that, rather than focusing on which canon should be taught, teachers need to teach students “the conflicts themselves, making them part of our object of study” (p. 12). In other words, as he sees it, teachers need to provide students with opportunities for exposure to “the process of discussion and debate [that] they need to see in order to become something more than passive spectators to their education” (p. 12).

Nash and his colleagues (1998) argue that learning history means much more than simply learning significant facts; it includes being able to think reflectively and critically about these facts:

. . . to educate children both to *know* and to *be able to do*: to know the grand sweep of our nation’s and our world’s history -- its pivotal events, long-term transformations, great landmarks, achievements, catastrophes, heroes, and villains; and to be able to think reflectively on all these things -- to develop the skills to find and use historical information, follow a historical argument, expose bias and bogus logic, grapple with the “ways” of the past, and relate the lessons of history to contemporary events and trends. (p. 272).

In addition, Nash and his colleagues go on to elaborate what history education means in a democratic society. They noted that first, in a democratic society, representations and interpretations of history should be kept open for revision because historical research will continue to produce new information and, accordingly, historians need to keep rewriting history. In addition, history represents a collective memory of society and is “bound to change as the issues that matter to us as a nation change” (Nash, Crabtree, & Dunn, 1998, p. 272). Second, acquiring historical thinking skills is equally important to learning historical facts and it is a false dichotomy that separates the learning of historical content from the learning of historical thinking:



Facts, to be useful, must be embedded in some context or pattern of meaning. In turn, students shape meaning by applying reasons, analysis, and judgment (Nash et al., 1998, p. 273).

For some Taiwanese scholars who are Chinese nationalists, these assertions on the part of American scholars are seen as simply unacceptable. They believe that the primary purpose of history education in Taiwan is to cultivate Chinese nationalism through the passing on of historical “facts” to students. Lee (1982), for example, who is a teacher educator and also a historian of Chinese history, articulated the purpose and the mission of history education as follows:

The purpose of history education has not been to engage students in investigating historical materials and analyzing them; rather, history education focuses on passing on historical knowledge which is meaningful in shaping students’ morality and learning about our country’s [China] culture and glorious past so that our Chinese culture can be preserved. History education is a vitally important area for the cultivation of Chinese nationalism in education (p. 41).

Having been educated by teacher educators like Lee, history teachers in Taiwan generally hold similar views. In one survey of 83 teachers, 96.4% of them considered the primary purpose of history education to be the cultivation of nationalism in students (Huang, 1985). In addition, 70% of teachers asserted that it was necessary to use government-mandated textbooks to “transmit a single version of historical facts to students and that this would be helpful for unifying our will for recovering the mainland” (Huang, 1985, p. 322).

Over the past decade, however, several Taiwanese scholars raised in post-war Taiwan have emerged with alternative views similar to those advocated by American scholars. They challenge the tradition of history education in Taiwan. One teacher educator argued that, as a democracy, the purpose of Taiwan’s history education should focus on students’ abilities to think critically and engage in historical analysis so as to



help them develop their own views about historical events and figures, instead of helping them merely consume traditional historical understandings (Chen, 1990). One historian criticized the traditional form of history education by calling it “indoctrination.” He asserted that teachers need to provide students with opportunities to learn that there are many histories:

Teachers need to guide students through the doing of history so that they understand that history is not a fixed body of historical facts; rather, through learning history, students learn how to analyze the complicated world where they live. . . . Through doing history, students are encouraged to realize that there are many histories, not one single version of history as stated by textbooks or teachers, and then they will understand the fact that any version of history is constructed from a certain perspective, held by both historians and by dominant political powers. (Wu, 1997, p. 36)

In the context of Taiwan -- where competing views of national identity coexist -- debates over what should be taught in schools might never be fully resolved. It is very clear, however, that without teaching students critical thinking skills with respect to history, simply transmitting a standard version of history to students and asking them to memorize a certain fixed body of historical knowledge will not result in any reform in history classes and the KMT’s authoritarian approach to education will remain. As Taiwan becomes more fully democratic, its people need to develop the ability to interpret their own history and to define that history for themselves: who they are and where they go from here. When students have had the opportunity to examine the record of the past for themselves, raise questions about it, and find evidence to support their answers, then they will learn that there are various versions of Taiwan’s history (and the way in which what has been taught has been a product of political power). This approach is clearly vastly superior to the historical tendency to simply transmit a certain body of historical knowledge, imposing one national identity on children as a result of the political



domination of the party in power.

Teachers, curriculum designers, the writers of textbooks, and policy makers need to broaden their view about the purpose of history education and the correct way to teach history: preparing students to become active thinkers instead of objects of ideological indoctrination. This is what many American scholars have identified as the primary goal of history education:

A primary goal of history education, therefore, should be to help young Americans understand that we do indeed live in a world that has always been complicated, but that those complexities can in some measure be analyzed, explained, and understood. (Nash, Crabtree, & Dunn, 1998, pp. 274-275)

It will not be easy for teachers to enact this ideal, engaging students in exploring the multiple perspectives of historical accounts and learning how to collect data, interpret it, and test the evidence. Teachers must know their subject matter well and must have opportunities to develop their teaching skills so as to be better able to educate fully democratic citizens. In addition, entrance examinations that are based on textbooks need to be modified or eliminated so that teaching and learning are not test-driven. Students need to have time and resources made available after school as well (such as library programs that are geared towards the new research that is being done on Taiwan's history). Educational reform is a multiple-faceted undertaking, involving efforts on the part of teachers, parents, teacher educators, curriculum designers, and policy makers. One especially critical part of this undertaking concerns teacher education.

### **Implications for Teacher Education**

I have argued that teachers face at least three primary challenges in the teaching of new and more progressive versions of history. These three challenges are all related to the central issue of helping teachers to improve their pedagogical strategies.



Teacher education plays a most important role in developing teachers' pedagogical practice. Researchers (Feiman-Nemser & Remillard, 1996; Kennedy, M. M., 1991; Wilson & McDiarmid, 1996) argue that teacher educators should treat teachers as they expect teachers to treat students. In other words, if we want teachers to change their practice, teacher educators should provide teachers with learning opportunities in which they experience first hand the way in which knowledge is socially constructed, discussing controversial issues, and developing alternative accounts based on the evidence that they are able to collect.

Taiwan's teachers were educated in authoritarian classrooms, and their apprenticeship observation have taught them the traditional version of what teachers do, how children learn, and what should be taught (Feiman-Nemser & Remillard, 1996). Prospective teachers have been taught that teaching means passing knowledge on from teachers to students and that learning means little more than memorizing textbook content. In addition, influenced by their prior experience as students, prospective teachers have come to believe that, in the relationship between the teacher and his or her students, the teacher must be authoritative, imposing his or her views on students, and persuading students to concur with what the teacher says. Teacher educators need to provide their students with opportunities to reflect on and critically examine their prior experiences as students and challenge their beliefs about teaching, learning, and subject matter indoctrination (Feiman-Nemser & Featherstone, 1992). Moreover, as Wilson and McDiarmid (1996) argue, in order to help develop prospective teachers' ability to think historically and their understanding of history's interpretative nature, teacher educators need to provide prospective social studies teachers with learning opportunities to develop

the ability to think about history in a critical way, assessing competing accounts, examining artifacts and primary sources, understanding how knowledge is created, and developing and supporting written arguments: “Without experiencing such learning and knowing themselves, future teachers are unlikely to do the same for their own students” (Wilson & McDiarmid, 1996, p. 297).

In addition to increased opportunities for teachers to join in in-service training workshops, the content of the workshops needs to be reexamined. Traditionally, Taiwan’s professional teacher development programs have focused on telling experienced teachers how to teach new curricula. Due to a lack of any empirical study in Taiwan concerning how teachers evaluate this kind of learning experience, however, little is known about the effectiveness of such in-service programs in helping Taiwan’s teachers to develop more progressive practices. In the case of the United States, these kinds of workshop opportunities have been criticized for being “decontextualized and contrived” and have been seen as especially valuable by many teachers (Wilson & Berne, in press). In contrast to the traditional model of “telling” teachers how to teach, researchers (Feiman-Nemser & Remillard, 1996; Kennedy, M. M., 1991) suggest that, to change teachers’ beliefs about teaching and learning, several conditions are needed to help teachers to achieve conceptual progress: First, teachers need to know why the new practices and their associated beliefs and values are better than traditional approaches. Second, teachers must see examples of these practices. Third, teachers need to have opportunities to directly participate in such practices. Based on this theoretical perspective, researchers suggest that more effective professional development programs need to incorporate the following features (Putnam & Borko, 1997):



Teachers should be treated as active learners who construct their own understanding; teachers should be empowered and treated as professionals; teacher education must be situated in classroom practice; teacher educators should treat teachers as they expect teachers to treat students (cited from Wilson & Berne, p.7, in press).

Policy makers and teacher educators in Taiwan need to seriously consider the suggestions of American researchers as to the improvement of in-service programs, the reexamination of the traditional model of in-service programs in Taiwan, and the design of new models.

Moreover, helping teachers become transformative intellectuals who can develop and teach more creative and student-centered curriculums, requires that teacher preparation and in-service programs help both prospective teachers and experienced teachers reflect on their cultural and national identities and understand how their histories shape their identities. This kind of reflection might help teachers understand themselves better in terms of political orientation and the way that their beliefs influence their learning of alternative accounts of Taiwan's history, their selection of subject matter to teach, and the role that they assume in teaching students about controversial issues. Kelly (1986) suggested that when controversial issues arise, the most appropriate role for teachers to assume is best described as "committed impartiality." This role centers on two imperatives. First, teachers must state their own views on controversial issues. Second, teachers should "foster the pursuit of truth by ensuring that competing perspectives receive a fair hearing through critical discourse" (p. 130). To foster a democratic climate in classrooms where students are allowed to express their own views and make up their own minds with respect to the choice of their national identity, teachers need to better understand themselves, especially with regarding to the possible

bias that accompanies their cultural and national identities. Moreover, teachers need to be prepared to be public educators rather than “merely servants of the state” (Giarelli, 1983, p. 57). To be public educators, teachers must be prepared “to conceive of educational problems in public terms and confront the state where necessary, not as troublemakers or agitators acting on their own ideological or personal agendas, but as responsible citizens acting on their civic purpose -- the formation of new publics (Giarelli, 1983, p. 57)

### **Conclusion**

This study was designed to shed light on citizenship education in general, and history education in particular, in a context where national identity is an extremely controversial issue. Despite the fact that this study concerns Taiwan, its finding may have implications for research on curriculum change, textbook content analysis, social studies education, history education, and teacher thinking in other countries as well. It raises several important questions. For example, in addition to political orientation and knowledge of subject matter, to what degree do other contextual factors, such as school culture or the examination system, play a role in teachers’ decision making about what to teach and how to teach when they help students in the development of a national identity? Another important question concerns what students learn in their social studies classes about the development of a sense of national identity. While I studied what teachers did and why, I was left wondering what sense students made of this instruction.

As a political issue that turns on both internal and external variables, the issue of national identity in Taiwan will not be resolved quickly in the years to come. Externally, the PRC’s military threats for Chinese unification with Taiwan have increased since the

return of Hong Kong to the PRC in 1997. Internally, the ruling party, the majority of which are mainlanders along with some Taiwanese, insist on being unified with the mainland when the PRC becomes a democracy, while the DPP and Taiwanese nationalists insist on making Taiwan a sovereign state. Fortunately, democracy is a shared value among people in Taiwan, and Taiwan's politicians believe that the will of Taiwanese citizens is the sole critical source for deciding who they are or who they shall become. Thus, educating students to become democratic citizens is of key importance for Taiwan.

Educational reform is but one national campaign among many political reforms. Classroom life cannot be isolated from the changes that are being experienced in the society at large. And the classroom has the potential to make a major contribution to progressive reform. Taiwan's teachers need to make classrooms themselves more democratic if Taiwan is to make further progress towards democratic development. Teachers need to avoid imposing their own national identities on students, as this represents political indoctrination rather than the teaching of critical thinking skills. Teachers face fundamental challenges in the front line of Taiwan's democratization movement, and, as with everyone else, they are limited in what they are able to see, understand, and convey to their students. All three of the teachers who participated in this study intended to help their students; all three believed that they were doing "the right thing." And all three need help imagining what the critically thinking citizens of the future will look like, and in developing the knowledge and skills that are necessary for the continued enhancement of the democratic heritage of Taiwan's future citizens.

## APPENDICES

## **APPENDIX A**

### **NOTES ON METHODS**

In this appendix, I describe and explain the research methods involved in this study. I begin with a description of this study's research design. Next, I recount how I met my three informants and gained access to their schools. I describe the variety of data collection methods that I have used and my techniques of data analysis. I conclude with a discussion of the challenges I faced as a researcher in conducting this study.

#### **Research Design**

In this study, I wanted to investigate the role of the teacher in the development of students' national identities. I focused on how three elementary school teachers' political orientations and understanding of Taiwan history shaped their content and pedagogy. I wanted to know how the three teachers thought of themselves as Chinese or Taiwanese, and how that sense of identity influenced their understanding of history, which in turn influenced their teaching. This effort involved eliciting information concerning my informants' personal political beliefs and subject matter awareness, interpreting my informants' testimony, and observing their interactions with students.

The research design of this project involved a comparative case study. Qualitative methods were most suitable for this project; the strength of qualitative data lies in detailed descriptions of "situations, events, people, interactions, and observed behaviors; directed quotations from people about their experiences, attitudes, beliefs, and thoughts" (Patton, 1980, p. 22). Since I was interested in understanding the relationship between shifting national identity and subject matter knowledge in teaching, using a case study





approach allowed me to “uncover the interaction of significant factors of the phenomenon” (Merriam, 1988, p. 10). By talking with three teachers and watching them teach, this approach let me explore the complexity of three cases of classroom teaching and uncover the interactions between political orientation, subject matter knowledge, and teaching style.

### **Selection of Informants and Gaining Access to Research Sites**

#### **Criteria for Selecting Informants**

Three informants were selected for this study. The sampling strategy adopted in this study was purposeful sampling to select information-rich informants (Honigman, 1982; Patton, 1980). Informants were selected on the basis of two conditions. First, I established the teacher’s political orientation. I selected at least one Taiwanese nationalist and one Chinese nationalist. Since political orientation was a parameter of this study, I wanted to make sure that my informants varied across a political spectrum. I was curious about whether or not and to what extent political orientation influenced teachers as they taught about Taiwan’s history and, by looking at informants who differed from each other in their political orientations, I was able to explore this issue through contrasts.

Participants were also selected on the basis of the fact that they would be teaching fourth grade social studies during the period of data collection, which was critical for the study’s observational components. All three participants were volunteers. According to Patton (1980), there are no rules for determining sample size. Sample size depends on what researchers want to know, the purpose of inquiry, and the time and resources that are available. In light of Patton’s suggestion, I planned to select at least two and no more



than four informants. Sample selection and the first interview concerning informants' political preference occurred simultaneously. When I knew that I had three informants whose political preferences varied from the KMT to the New Party to the DPP, I felt that the basic patterns of national identity were fully represented. Thus, I did not go on to find a fourth informant. Furthermore, because classroom observation is labor intensive, I could only observe three teachers within an appropriate time frame for data collection.

There are several series limitations that accompany such a sample. First, I was unable to investigate questions concerning variation within one kind of national identity. Mr. Lin is the only Taiwan independence advocate in the study, and I cannot and do not claim that he is representative of all independence activists. Similarly, I do not consider the two women teachers representative of members of the KMT or supporters of the New Party. In sum, I cannot hope to make claims about the general taiwan's teaching force based on three teachers. However, my in-depth examinations of their thinking and teaching do allow me to generate hypotheses -- in an exploratory sense -- about the relationship between national identity, political orientation, subject matter knowledge, and teaching. I hope to pursue these hypotheses in future research.

### **Meeting Informants**

In September of 1997, I started to look for potential informants. Through the Teacher League,<sup>1</sup> an association whose members are militant Taiwanese nationalists, I

---

<sup>1</sup> The League, which was established in 1992, currently is composed of around 100 teachers who have made a commitment to pursue an independent Taiwan. One goal of the League is to bring a Taiwanese-centered perspective into teaching, so as to cultivate a Taiwanese identity in students. Teachers in the League regularly host lectures, addressing issues related to Taiwan's politics, cultures, and environmental conservation.

met Mr. Lin. I explained my research project to him and mentioned his rights and freedoms as an informant if he joined this research. He felt that my topic was meaningful and in our first encounter, he agreed to participate. Having decided upon Mr. Lin as a representative of Taiwanese identity, I continued to look for the other informants with a Chinese identity.

I then visited Ai-guor Elementary School's principal, asking to be introduced to potential informants. I had met the principal when she visited to the University of Michigan in 1994. Subsequently, I visited her when I went back to Taiwan in 1996, and, during that visit, she introduced me to Ms. Chen, the director of the teaching division.

When I visited the principal in 1997, she remembered me. Through the principal, I met Ms. Chen and talked with her about my research interests. She enthusiastically volunteered to be an informant. She told me that the decision was made partly because I was the principal's acquaintance and partly because she felt that working with me might be helpful in her teaching, through sharing ideas with me with respect to her teaching style.

To find the third informant, I tried to contact people with connections to elementary schools in Taipei. For instance, I made a call to a teacher educator who worked in a teachers college. I read her book, a qualitative study concerning social studies teaching, and subsequently called her department to find out how to contact her. I introduced myself to the secretary and told her that I would like to ask the teacher educator's advice about conducting research in Taiwan. The secretary, however, did not want to give me the teacher educator's personal data and she wanted me to leave my phone number with her instead. One week went by and I had not received any

information from either of them.

I then tried to find other ways to contact elementary school teachers. My friend asked her son's social studies teacher (her son was a fourth grader at that time) but the teacher explained that she did not like to have people to observe her teaching. The teacher told my friend that "a simple interview about my teaching is all right but I do not want to be observed in the classroom." Another friend told me that in recent years the government had changed textbook policies and several publishers started to develop textbook projects, thus the publishers invited elementary school teachers to join their projects. I called a famous publisher who was involved in publishing the new elementary social studies textbooks and asked them to introduce me to one or two social studies teachers. Through the publisher, I was introduced to the director of teaching division of Hsin-yi Elementary School. The director then recommended Ms. Hu to me because she was one of the school's best teachers. Just as with Mr. Lin, the first time I met Ms. Hu, I explained my research; Ms. Hu promised to serve as my informant without hesitation. She said that talking with a researcher about her teaching might be of benefit to her teaching.

I did not encounter any resistance to my research on the part of the school principals involved. Principals in the three schools, however, used the same procedure for granting access to their schools: I was required to submit a letter to them in which I briefly introduced myself, the purpose of this research, and my research methods. After receiving my letter, the principals quickly responded by telephone with unanimous approval. I then started to collect data.



## **Data Collection**

My data falls into three categories: (1) interviews, (2) observations, and (3) documents. I describe each briefly.

### **Interviews**

I had many interviews with each informant. There were four structured interviews with each and non-structured interviews before and after each observation. I also had informal interviews with classroom teachers, administrators, and the principal of each school. I used both Mandarin and Taiwanese throughout interviews, according to my perceptions of which language the interviewees would prefer. For instance, Mr. Lin preferred to use Taiwanese and only rarely used Mandarin. I followed his pattern of using both languages during the interview process. In contrast, Ms. Chen and Ms. Hu never used a sentence of Taiwanese during our interviews, therefore, I did not use Taiwanese when I interviewed them. Cusick's (1983) description of his experiences talking with high school teachers echoes my experience: when you show a sincere interest in listening to teachers, they are happy to respond to your questions.

Each structured interview lasted approximately 90 minutes. I had a protocol that listed questions. I asked each informant the same questions which allowed me to, subsequently, have the same categories in my cross-case analyses. The protocols were developed before I left the U. S. for Taiwan, for I was very concerned that -- as a novice researcher -- I would be conducting this research far away from the educative support and ready counsel of my university. Every structured interview was tape-recorded and transcribed.

I scheduled the opening interview with each informant soon after our first





encounter. The first interview served three purposes. First, I used this interview to become certain concerning Ms. Chen's and Ms. Hu's national identities. I already knew Mr. Lin's national identity since he was a member of Teacher League; I was, therefore, able to make a decision on the numbers of my informants for purpose of the study. Second, I used the opening interview as an opportunity to cultivate a feeling of rapport and trust. Third, I used this interview to elicit information from my informants concerning their life stories.

The first interview was a biographical interview. I asked each informant why he or she became a teacher, about noteworthy experiences while teaching, about learning Taiwan history as a student, about purposes of teaching social studies and Taiwan history, and finally, about the role of Taiwan history in shaping students' view of national identity. During the interviews, all three teachers seemed to enjoy telling me their life stories. For instance, Ms. Chen voluntarily told me about her teaching experience in chronological order without any further probing. Mr. Lin volunteered stories about his childhood in a farming village and why he decided to become a teacher. Ms. Hu told me stories about her history teacher in middle school and how she thought of teaching Taiwan history based on her experience with that teacher.

I used the last question of the opening interview to elicit the teacher's national identity. In response, all three volunteered their national identities. But I needed still more information, for I wanted to vividly portray each informant's national identity. I designed questions, therefore, that enabled me to spend 90 minutes to two hours in a second interview -- the political orientation interview -- to elicit the informants' views of national identity, including political party preference and their explanations of the

meaning of being Chinese and Taiwanese. Also, I asked them to share their views concerning Taiwan's future. Most of my questions were familiar, appearing on surveys or related to issues discussed among the general public and the media. For instance, I asked the informants whether they thought about themselves as Chinese or Taiwanese. But my interview did not take the form of survey in which responses were limited to a single choice, of yes or no. Rather, I asked them to explain what they meant by Taiwanese and Chinese. I also used controversial current affairs to elicit their opinions about Taiwan's national status. For instance, I showed each informant a newspaper clipping in which the PRC asserted that Taiwan should follow Hong Kong and accept the model of "one China two systems." After the informant read the article, I asked him or her to comment on it.

Probes and prompts were used during interviews. For instance, Ms. Hu mentioned that in her childhood, she and her siblings felt proud when they told people that they were mainlanders. She did not go on to elaborate why. I probed:

Ms. Hu: It frequently happened that in my childhood, people mistook me for a Taiwanese. My mother is Taiwanese, therefore, her children look Taiwanese. When I encountered such a mistake, however, I told people without hesitation that I was a mainland. I felt proud, when I told people I was *waih-sheeng rern*.

Interviewer: Why you felt proud?

Ms. Hu: Because mainlanders speak standard Mandarin and most of them are educated and are middle class. I do not like people who have a Taiwanese-accent. Before I was married, I solemnly vowed that I would not be married a man who had a Taiwanese-accent.

Interviewer: Why?

Ms. Hu: I do not know. It is a matter of personal prejudice.

Interviewer: What does a Taiwanese accent mean to you?

Ms. Hu: I just do not like to hear a Taiwanese accent. . . . May be . . . it is because Taiwanese who live in rural areas usually speak with a Taiwanese accent but Taiwanese who live in Taipei seem not to do so. People who speak with a Taiwanese accent seem less likely to have had a higher education than those people who speak standard Mandarin. Laborers, farmers, and the generally less well-educated speak with a Taiwanese accent.

During this interview, as with other interviews, I appeared interested in their opinions, listening quietly, occasionally probing, and clarifying their ideas. The three informants frankly expressed their political party preferences. When Mr. Lin criticized the KMT, I nodded (he might think I agreed with him) and he continued on in this vein. When Ms. Chen criticized the DPP, however, I also nodded. Ms. Hu provided me with a great deal of information concerning her family background and her Chinese patriotism. All of the informants seemed to feel comfortable talking with me about their political orientations. Each informant seemed to see me as his or her comrade. They might make such a judgment based on my background. When I met Ms. Hu and Ms. Chen for the first time, I introduced myself as someone who had taught the Three Principles of People in high school. Therefore, they might well have assumed that I was a supporter of the KMT. Because I was introduced to Mr. Lin by the secretary of the Teacher's League, probably Mr. Lin thus assumed that I was a supporter of Taiwanese independence.

My third interview -- the teachers' concept of history interview -- was designed to elicit informants' understanding of the interpretive nature of history. I asked each of the informants three questions: What is history? What do historians do? What do you think the version of Taiwanese history would be like with a Taiwanese-centered perspective?

In a fourth interview -- the topic identification interview -- I investigated the

informants' level of subject matter knowledge. Fifteen topics were selected from the textbook that the all three informants used. Another 65 topics were selected from other texts, including the new textbook, knowing about Taiwan, which has been used in middle schools since 1997. These topics ranged from political figures, to legislative acts, wars, to historical events. In order to make sure that the selection of topics was sufficiently credible so as to accurately assess my informants' understanding of Taiwan history, I consulted two historians with expertise in Taiwan history.

During this interview, the informant was presented a card on which a topic was written and asked to talk about the subject.<sup>2</sup> Unlike the other interviews, during this interview, I did not probe further. The interview was structured much like an oral test. To avoid to explicitly exposing the informant's ignorance, I believed that if I simply listened to them without probing, that would not put my informants in embarrassing or compromising positions.

These four structured interviews were carried out between September of 1997 and February of 1998. If the informant elaborated more information that I thought was especially useful, I asked the informant to arrange an additional interview on that topic. For instance, all of the informants had two interviews concerning the issue of political orientation. In addition, I pursued answers to questions that emerged in the prior interviews. For instance, in a post-observation interview, Ms. Chen mentioned that she adopted a "constructivist approach" in her social studies class. Wishing to understand more about what she meant by that and why she considered her teaching to represent a

---

<sup>2</sup> This method of stimulating informants to recall what he or she knows about the given

“constructivist approach,” I added an extra interview.

The pre- and post-observation interviews are largely non-structured. The purpose for conducting these interviews was to gather information about the teachers’ lesson plans and to better understand their beliefs regarding teaching and learning Taiwan history.

The pre-observations interviews were carried out largely while walking from the teacher’s office to classrooms. Therefore, pre-observation interviews were not tape-recorded. I had to recall what I had talked with the teacher about very soon after I finished the observation. These pre-observation interviews were non-structured in the sense that there were some issues that I chose to pursue depending on their responses. Unlike structured interviews, the issues and questions were developed along the course of the interview, depending on issues raised by informants. Basically I asked each informant four questions: (1) What topics would be covered for each section? (2) What teaching objectives did they have for each section? (3) Which concepts, events, and historical figures were seen as important to students? and (4) What teaching activities would be used?

Ideally, right after each observation, I should have had a post-observation interview. However, the teachers did not have time to talk with me right after class. Thus, I only got one post-interview per week for each informant. I framed questions based on my observations of each informant that I had done that week. Some questions varied among the informants but some questions were the same.

---

topic presented on each card is adopted from Wilson (1988).



Interviews with homeroom teachers and administrators. I had a semi-structured interview with each of the homeroom teachers of the classes that I was observing as well as each of the administrators. Each interview took about 40 minutes. I constructed an interview guide, in which general questions were covered, rather than a list of questions in a particular sequence. The purpose of conducting these interviews was to get to know more about the particular school setting and surrounding community. Questions asked of administrators included the community in which the school is located, the parents' social status, and the number of classes in the school. In the same vein, each homeroom teacher was asked general questions regarding parents' social status, concerns, and attitudes towards their children's learning in the school.

### **Observations**

In addition to interviews, observations were essential to this study. Observations allowed me to gather firsthand data concerning each informant's instruction and interactions with students. Because social studies teachers taught the focal unit during the same period of time, I did not observe each of them for the same amount of time. I observed Ms. Chen for 14 periods, Ms. Hu for 12 periods, and Mr. Lin for 9 periods. Each period in Taiwan's elementary school is 40 minutes. During observations, I unobtrusively sat in the back of the classroom and took notes.

Merriam (1988) has noted that what to observe is to be determined by the researcher's purpose and the conceptual framework for conducting the study. For the purpose of this study -- to describe and explain the role of teacher in the development of national identity in students -- I focused on several aspects of teaching: (1) What topics were covered? (2) How did the teacher convey those topics? (3) How did the teacher use





the textbook, teachers' manual, and the workbook? I also focused on the interactions between the teacher and students, including questions asked by the teacher and the responses made by students (and vice versa).

I did not tape-record or video-record during observations. I only took notes on what I observed. My observation notes contained basic information such as dates, the site where the observation took place, who was present, what physical setting looked like, the interactions between the teacher and students occurred, and what the teacher taught and how he or she taught. Before I went to the class, I wrote some basic information such as the date, the teacher's name, the school, and the title of unit taught at the top of the observation form. During observations, on my observation form, I wrote down information about the teacher's activities in the left column and information about students' activities on the right column. I briefly recorded the teacher's instruction, including the topics and the ways the teacher interacted with students. When the teacher had a dialogue with students, I recorded the dialogue verbatim. Throughout the observations, I used Chinese and it was no problem for me to write quickly and precisely.

In addition to my notes concerning my observations of classroom practice, I also had field notes in which I recorded what I saw in classrooms and in teachers' office in terms of what teachers were saying and how they had behaved. For instance, I learned how Ms. Chen evaluated students as students showed her the texts that they had collected at home. I also recorded what the language Mr. Lin used when he talked with his colleagues in the teachers' office.

After leaving classrooms, I recalled what I had observed in the classroom and as soon as possible I wrote down a detailed account of it. As I took a taxi from Mr. Lin's



school to my home, for example, I recalled what I had observed and checked my notes. Ms. Hu's and Ms. Chen's schools are located in the same district where I live. As I walked home, the situations I observed remained fresh in my mind and then I would sit down and work on the observation notes when I got home. However, it was hard to maintain such discipline at all times. Sometimes, when I was tired, if I did not do the task soon after I came back home, I would end up leaving the task to the next day or not later than the next class.

### **Documents**

A variety of documents were collected from informants for this study: supplementary teaching materials, quizzes used by teachers, the textbooks and the teachers manual, old textbooks and teachers' manuals, and curriculum standards issued by the Ministry of Education. Mr. Lin had supplementary materials that he used in the class when he introduced the geographical location of Taiwan and Taiwan's aborigines. Ms. Hu also had supplementary teaching materials used to help students to learn about aboriginal tribes. Ms. Chen gave students a list of questions and she used the questions as the important topics taught in her classes. These documents were important because they shed light on the type of information each teacher felt was significant to learn about with respect to Taiwan's history. For instance, I analyzed Ms. Chen's list of questions, I saw that they were primarily served to aid memorization of textbook knowledge.

I also collected was textbooks and teacher's manuals. I copied old textbooks and manuals from library. In addition, I bought the textbooks and teacher's manuals that currently used in schools from bookstore. I also collected curriculum standards issued by the Ministry of Education from the 1940s to the recent times. With these documents, I



analyzed the evolution of curriculum change over time and also specifically documented textbook content, seeking the themes that contributed to the development of Chinese identity in students.

### **Data Analysis**

Data analysis for this study was an on-going process, overlapping with the data collection, and continuing after the data collection was finished. It involved multiple levels of analysis, including focusing on single case analyses as well as before moving to cross-case analyses. Primarily, there were three stages of data analysis.

#### **Stage One:** **Transcribing Interviews and Writing Field Notes and Memos**

The first stage of data analysis took place during data collection. In this first stage, I focused on individual cases by carefully studying interview transcriptions and observation field notes. At the same time, I also reviewed my research proposal. Reviewing the proposal served two purposes: I wanted to avoid wandering far astray from my original research questions and to make sense of new issues that arose.

To make my reading of interview transcriptions and observation field notes more effective, I wrote memos about each interview and observation. In each interview memo, I wrote the main issues or themes of the interview. In addition, I summarized the information that I obtained from each question asked. To simplify the process, I used the pre-existing categories from the interview protocols as headings. Under each heading, I paraphrased each interview transcription, citing significant phrases and words. If I found there were new (or remaining) target questions that needed to be pursued, I made notes in the memo (Miles & Huberman, 1994). Writing the interview memo helped with data

analysis in two ways: (1) It helped me to summarize the information obtained during interviews; (2) it helped in the generation of new target questions.

Besides interview memos, I also wrote observation memos, which took a narrative form in which I described what I saw in the class. In the observation memo, I summarized data from field notes and the pre- and post-observation interviews. There were three sections in a memo: a summary of the teaching, explanations that focused on informant's views of his or her teaching, and anything that struck me as interesting and salient to be pursued in greater depth.

Writing observation memos helped me construct a picture of the topics taught and the instructional methods used. For instance, when I finished several observation memos about Ms. Hu, I found that her teaching was textbook-centered and she considered it important for students to master the textbook's "facts." This conclusion was clearly justified based on the data in the observation memos that noted how Ms. Hu began class by asking students to read the textbook and then presented a set of transparencies in which a list of critical points were presented. She ended class by selecting some sentences from the textbook that she considered important to learn and asked students to mark those sentences in their own books. Noting this pattern, I later asked Ms. Hu to explain why she taught this way. I used the same procedure to study the teaching of Ms. Chen and Mr. Lin. Writing memos about my observations and searching for patterns helped me surface both patterns and questions.





**Stage Two:**  
**Coding, Sorting, and Writing Thematic Summaries**

As I finished data collection, I started the second stage of data analysis. I began by reading through all of my data -- including transcriptions, field notes, observation notes, and memos -- several times, moving from one teacher's case to another. While reading the data, I sought information relevant to my research questions. I also paid attention to information that I had not originally considered significant.

As I went back and forth between these texts, I marked words, sentences, and paragraphs that seemed significant instances of informants' perceptions, opinions, and intentions. I then made cards on which each informant's words were written verbatim. Each card contained one unit of information and was labeled to indicate its content. For instance, on one card labeled as "historical fact," I wrote verbatim Ms. Hu's idea about what was historical fact: "The printed words presented in textbooks are true facts. Usually, the printed word in texts are almost always true." This process of coding produced piles of cards. I then categorized them. Basically, I sorted these cards into several major categories that were the themes that emerged from an exhaustive survey of the data. There were sections dealing with political orientation, subject matter knowledge, beliefs concerning the learning and teaching of history, and social context such as school and community. I then developed a set of sub-categories under each of the main categories. For instance, under the category of political orientation, there were sub-categories of political affiliation, cultural identity, and ethnic identity. Some sub-categories had other sub-categories. For instance, under ethnic identity, the meaning of being Taiwanese as perceived by the informants was constructed as one sub-category

under the category of general ethnic identity.

When the work of coding and sorting was finished, certain prominent themes emerged. Some themes were issues that were relevant to my original research questions but some were new issues that had surfaced and surprised me as I looked closely at my data. Based on the units of information written on index cards, I wrote summaries for each issue. For instance, I wrote summaries about three schools I visited and three classes I observed, informants' beliefs concerning the teaching of history, informants' understanding of Taiwan history in particular, and Ms. Chen's idea of constructivism.

**Stage Three:**  
**Writing a Single Case Summary and Making Comparisons Across Case**

I returned to the United States in June 1998. From June to September, I wrote cases about each teacher. Writing the case required pulling together and organizing voluminous data and memos into a comprehensive package. In the process of writing the case summaries, I went back and forth between raw data, interview transcriptions, index cards, and memos, and my handwritten observations. I read these texts many times during which I sifted out the significant data, sorted out data that seemed less important, and connected the parts together. For instance, when I wrote the case summary on Ms. Chen, I found that she provided rich data about her teaching career that spanned more than three decades. Therefore, I decided to select some most significant highlights, bypassing less important events in Ms. Chen's case. My criteria for including something were based on the study's focus. Each case summary was written chronologically. The components of each case included school setting, community where the school located, the informant's academic and professional background, political orientation,



understanding of Taiwan history, beliefs concerning teaching and learning of history, his or her purposes of teaching social studies as well as Taiwan history, and classroom vignettes.

When I finished each case, I started looking at similarities and differences across cases. Themes emerged from the data that were salient with respect to similarities and differences among the teachers. They included purposes of teaching Taiwan history, political orientation, national identity, subject matter knowledge, beliefs of learning and teaching of history, concept of history, the selections of textbook content to teach, and their instructional approaches. These themes were topics I wrote about in the comparative case studies in attempt to draw meaningful cross-case conclusions.

### **The Researcher's Role**

In the first chapter, I discussed my own shifting national identity. Because the researcher is an instrument in a qualitative research project, I had concerns about my political orientation and my role as a researcher. It is not possible for researchers to be value-free, for all of us bring our own cultural and political views to our research. Thus, the question for me was not “Did my own shifting national identity influence my research?” but, rather, “How did I handle my own biases in this research project?”

As Hammersley and Atkinson (1983) have indicated: “Reflexivity has implications for the practice of social research too. Rather than engaging in futile attempts to eliminate the effects of the researcher, we should set about understanding them” (p. 17). Peshkin (1985) also admits that, “I bring my biases or inclinations to my research” (p. 278). He further argued that his subjectivity was “both unavoidable and virtuous” (p. 279) for it was “one basis for my distinctiveness” that functions to “narrow

what I see and shapes what I make of what I see” (p. 278).

As researcher, I consistently kept an eye on my own political orientation. I asked myself the following questions: (1) Would my own political orientation bias my relationships with my informants? (2) Would my own sense of national identity lead me to be selective in what I heard or -- even worse -- selective in showing what my informants said? (3) Would I interpret data in biased ways, focusing on some things while blinded to others?

While I worried about these issues, I also tried to take advantage of my personal interests in my study. As Patton (1980) argued:

Getting close enough to the situation observed to experience it firsthand means that evaluators can learn from their experiences, thereby generating personal insights. (p. 475)

Having shifted from a Chinese identity to a Taiwanese identity helped me to understand the political orientation of my three informants, for I could sympathize with why any of them insisted on his or her identity and rejected the rival one. For instance, during an interview, Ms. Hu, who held a strong Chinese identity, asserted that the people of Taiwan should help the mainland China improve their economy. She said that even if the Chinese unification were to compromising the existing Taiwanese standard of living, she was willing to accept that. I was not surprised with her opinion, nor did I appear upset. I used to think the exact same thing. I understood why one would think that way. And so I nodded and kept quiet. My attitude made her feel comfortable to tell me more about herself as a Chinese nationalist. Peshkin (1985) noted that the virtue of subjectivity is that it “concentrates and focuses attention; and it produces as ‘it’” (p. 278). Similarly, my own subjectivity has directed my focus along significant themes that have been used

to tell the three informants' stories. For instance, I focused on the three informants' views of Taiwanese culture and language. And during interviews, I probed Ms. Hu's belief about the beauty of Mandarin.

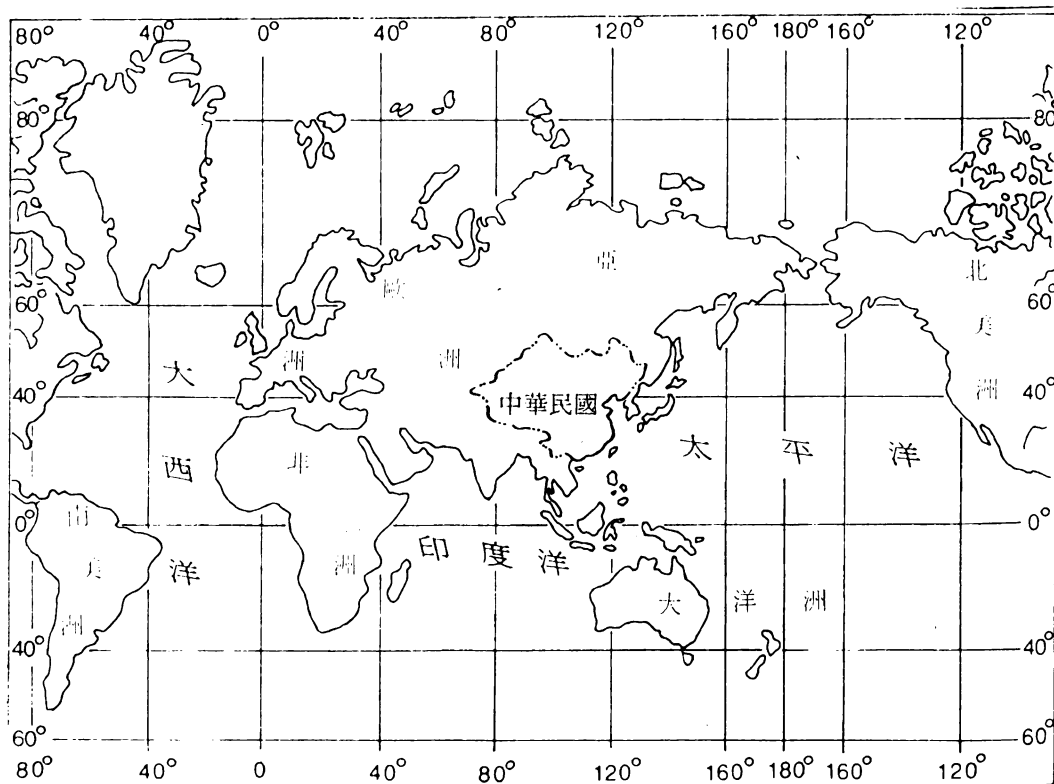
As a comparative case study, each informant's political orientation and subject matter knowledge were presented in contrasts. Each participant was given his or her place and was able to voice his or her ideas. The problem was when I selected data to portray each informant, did my own political orientation bias or lead me to distort my portraits of the informants? Peshkin (1985) declared that "my story must be borne out by facts that are potentially available to any other researcher" (p. 278). This was what I tried to do when I told the three informants' stories. To the limited extent that it is possible, I strove to let the data speak for my informants. I relied on interview transcriptions and observation filed notes and I presented quotations verbatim. I invited readers to focus on the three informants' own words. Peshkin (1985) cited an explanation of objectivity from Webster's dictionary: "independent of what is personal or private in our apprehension and feelings; expressing or involving the use of facts without distortion by personal feelings or prejudices" (p. 279). My efforts were to make the description of the three teachers' stories as objective as possible.

Even if my descriptions of the three teachers can be said to be more or less objective, however, what about my interpretations of their stories? Patton (1980) has defined interpretation as: "Interpretations means attaching significance to what was found, offering explanations, drawing conclusions, extrapolating lessons, making inferences, building linkages, attaching meanings, imposing order, and dealing with rival explanations, disconfirming cases, and data irregularities as part of testing the viability of

an interpretation” (p. 423). As a researcher, I lived with the data from the field and reflected on patterns and themes that emerged from the data. I was in a good position to interpret the significance of the three teachers’ stories. When I studied how the three teachers conducted their classes, my own political orientation did not prevent me from seeing, for example, the authoritarian teaching style employed by Mr. Lin, despite the fact that the themes he emphasized fitted well with my own political orientation. As a Taiwanese nationalist, for instance, I was well aware of the reasons for Mr. Lin’s political dogmatism. I found in Mr. Lin’s teaching, my “research self,” an identity fashioned by my particular research situation, surely more salient than my “human self,” my identity in everyday life situation (Peshkin, 1985). In this situation, I was able to draw my conclusions that helped to indicate the complexity of the challenges faced by teachers if they are to educate fully democratic citizens on the island of Taiwan. Surely the tale I tell here is limited, and not the only version that someone might tell. Nonetheless, is the story that, “I am moved to tell” (Peshkin, 1985, p. 280).

APPENDIX B

THE ROC MAP IN TAIWAN'S TEXTBOOKS

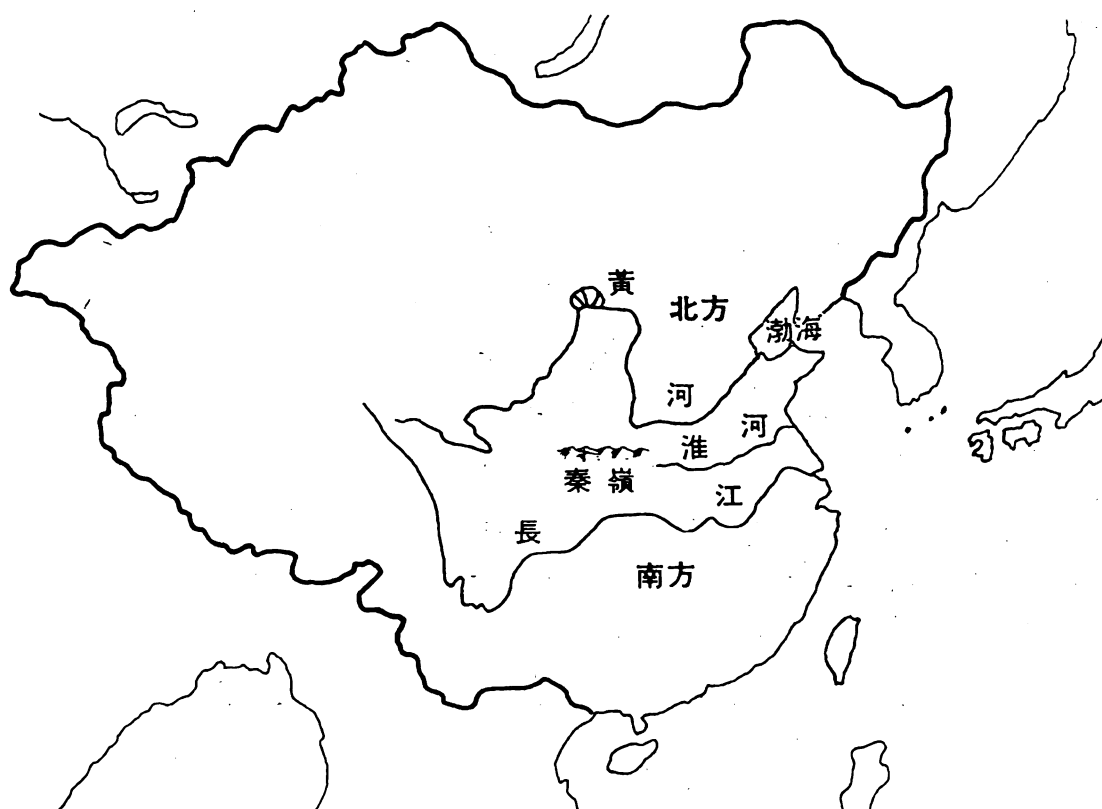


我國的位置圖



APPENDIX B

THE ROC MAP IN TAIWAN'S TEXTBOOKS



## REFERENCES



## LIST OF REFERENCES

### (IN ENGLISH)

Almond, G., & Verba, S. (1965). The civic culture: Political attitudes and democracy in five nations. Boston: Little-Brown.

Anderson, C., Avery, P. G., Pederson, P. V., Smith, E. S., & Sullivan, J. L. (1997). Divergent perspectives on citizenship education: A Q-method study and survey of social studies teachers. American Educational Research Journal, 34 (2), 333-364.

Angell, A. V. (1991). Democratic climates in elementary classrooms: A review of theory and research. Theory and Research in Social Education, 19 (3), 241-266.

Anyon, J. (1979). Ideology and United States history textbooks. Harvard Educational Review, 49 (3), 361-385.

Apple, M. W. (1979). Ideology and curriculum. New York: Routledge.

Axtell, J. (1987). Europeans, Indians, and age of discovery in American history textbooks. American History Review, (92), 621-632.

Ball, D. L., & McDiarmid, G. W. (1990). The subject matter preparation of teachers. In W. R. Houston (Ed.), Handbook of research on teacher education (pp. 437-449). New York: Macmillan.

Ballantine, W. J. (1952). Formosa: A problem for United States foreign policy. Washington, D. C.: The Brookings Institution.

Banks, J. A. (1995). Transformative challenges to the social science disciplines: Implications for social studies teaching and learning. Theory and Research in Social Education, 23 (1), 2-20.

Barnett, A. D. (1963). China on the eve of communist takeover. New York: FREDERICK A. PRAEGR, publisher.

Barth, J. L., & Shermis, S. (1970). Defining the social studies: An exploration of three traditions. Social Education, November, 1970, 743-751.

Baum, J., & Sherry, A. (1999). Identity crisis. Far Eastern Economic Review, Match 4, 1999, 21-22.

- Baum, J. (1990). Vernacular vogue. Far Eastern Economic Review, August 30, 1990, 32-33.
- Baum, Julian (1997). Schools of Thought. Far Eastern Economic Review, August 14, 1997, 26-27.
- Ben-Peretz, M. (1975). The concept of curriculum potential. Curriculum theory network, 151-159. Toronto: Institute for Studies in Education.
- Bellwood, P. (1991). The Austronesian Dispersal and the Origin of Languages. Scientific American, July 1991, 88-93.
- Berman, D. K. (1992). Words like colored glass: The role of the press in Taiwan's democratization process. San Francisco: Westview Press.
- Beyer, E. L. (1996). The meaning of critical teacher preparation. In Beyer, E. L. (Ed.), Creating democratic classrooms (pp. 1-26). New York: Teacher College Press.
- Borko, H., & Putnam, R. T. (1995). Expanding a teacher's knowledge base: A cognitive psychological perspective on professional development. In Guskey, T., & Huberman, M. (Eds.), Professional development in education (pp. 35-65). NY: Teacher College Press.
- Borko, H., & Putnam, R. T. (1996). Learning to teach. In D. C. Berliner, & R. C. Calfee (Eds.), Handbook of educational psychology (pp. 673-708). New York: Simon & Schuster Macmillan.
- Bosco, Joseph (1994). The emergence of a Taiwanese popular culture. In Murray A. Rubinstein (Ed.), The other Taiwan: 1945 to the present (pp. 392-403). New York: An East Great Book.
- Brooks, J. G., & Brooks, M. G. (1993). The case for constructivist classrooms. Alexandria, Virginia: Association for Supervision and Curriculum Development.
- Brophy, J. E. (1982). How teachers influence what is taught and learned in classrooms. The Elementary School Journal, 83 (1), 1-13.
- Brophy, J., & VanSledright, B. (1997). Teaching and learning history in elementary schools. New York: Teacher College Press.
- Brown, R. (1995). Managing the learning of history. London: David Fulton Publishers.
- Calderhead, J. (1996). Teachers' beliefs and knowledge. In D. C. Berliner, & R. C. Calfee (Eds.), Handbook of educational psychology (pp. 709-725). New York: Simon & Schuster Macmillan.

Carr, E. H. (1964). What is history? New York: Alfred A. Knopf.

Chang, Mau-kuei (1995). Provincialism and nationalism. In Taiwan Studies, 1 (2), Chang, Mau-kuei, & Bosco, J. (Eds.), Ethnic relations and national identity in Taiwan, (pp 67-96). NY: M. E. Sharpe Inc.

Chang, Kwang-chih, (1969). Fengpitou, Tapengkeng, and the prehistory of Taiwan. Department of Anthropology in Yale University.

Chang, Parris H. (1998). Taiwan after 1997. Far Eastern Economic Review, August 14, 1997, p. 28.

Chao, Linda, & Myers, R. H. (1994). The first Chinese democracy: Political development of the Republic of China on Taiwan, 1986-1994. Asian Survey, 34 (3), 213-230.

Chao, Linda, & Myers, Ramon H. (1998). The First Chinese democracy: Political life in the Republic of China on Taiwan. London: The Johns Hopkins University Press.

Chang, Belinda Huei-Yuan (1997). A theater of Taiwaneseeness: Politics, ideologies, and Gezaixi. The Drama Review, 41(2), 111-129.

Chen, Lung-chu, & Lasswell, H. D. (1967). Formosa, China, and the United Nations: Formosa in the world community. New York: St. Martin's Press.

Cheng, Robert L. (1994). Language unification in Taiwan: Present and future. In Rubinstein, M. A. (Ed.), The other Taiwan: 1945 to the present, (pp. 357-391). New York: An East Gate Book.

Cheng, Tun-jen (1989). Democratizing the Quasi-Leninist regime in Taiwan. World Politics, July 1989, 471-499.

Cheng, Tun-jen (1997). Taiwan in 1996. Asian Survey, 37 (1), 43-54.

Cheng, Tun-jen, & Liao, Yi-shing (1998). Taiwan in 1997. Asian Survey, 38 (1), 53-63.

Chiu, Hungdah (1993). Constitutional development in the Republic of China on Taiwan. In Steve Tsang (Ed.), In the shadow of China (pp. 17-47). Honolulu: University of Hawaii Press.

Chou, Yangsun, & Nathan A. J. (1987) Democratizing transition in Taiwan. Asian Survey, 27 (3), 277-299.

Chun, Allen (1994). From nationalism to nationalizing: Cultural imagination and state formation in postwar Taiwan. The Australian Journal of Chinese Affairs, (31), 49-69.

Chun, Allen (1996 a). Fuck Chineseness: On the ambiguities of ethnicity as culture as identity. Boundary 2, Summer 1996, 111-128.

Chun, Allen (1996 b). Discourses of identity in the changing spaces of public culture in Taiwan, Hong Kong, and Singapore. Theory, Culture, & Society, 13 (1), 51-75.

Clark, C. M., & Perterson, P. L. (1986). Teachers' thought process. In M. C. Wittrock (Ed.), Handbook of research on teaching (pp. 255-296). New York: Macmillan.

Cogan, J. J. (1998). Citizenship Education for the 21<sup>st</sup> Century: Setting the Context. In Cogan, J. J., & Derricott, R. (Eds.), Citizenship for th 21<sup>st</sup> century: An International Perspective on Education (pp.1-20). London: Kogan Page Limited.

Cohen, D. K. (1990). A revolution in one classroom: The case of Mrs. Oublier. Educational Evaluation and Policy Analysis, 12 (3), 311-329.

Cohen, Marc J. (1987). One China or two?: Facing up to the Taiwan question. World Policy Journal, 4 (4), 621-649.

Cohen, Marc J. (1988). Taiwan at the crossroads: Human rights, political development and social change on the beautiful island. Washington, D. C.: Asia Resource Center.

Cohen, M. L. (1994). Being Chinese: The peripheralization of traditional identity. In Tu, Wei-ming (Ed.), The living tree: The changing meaning of being Chinese today (pp.88-108). CA: Stanford University Press.

Copper, J. F. (1996). Taiwan: Nation-state or province? Boulder, Co.: Wstview Press.

Cornbleth, C. (1982). Citizenship education. In E. Mitzel (Ed.), Encyclopedia of education research (pp. 259-265). New York: Macmillan.

Cornbleth, C., & Waugh, D. (1995). The great speckled bird: Multicultural politics and education policymaking. New York: ST. Martin's Press.

Crabtree, Charlotte (1989). Returning History to the Elementary Schools. In Paul Gagnon (Ed.), History literacy (pp. 173-187). New York: Macmillan Publishing Company.

Croizier, R. C. (1977). Koxinga and Chinese nationalism: History, myth, and the hero. Massachusetts: Harvard University Press.

Cuban, L. (1993). How Teachers Taught. New York: Teachers College Press.

Cusick, P. A. (1983). The Egalitarian ideal and the American school: Studies of three schools. New York: Longman.

Cuthbertson, G., & Grundlingh, A. (1995). Distortions of discourse: Some problematical issues in the restructuring of history education in south African schools. In Dickinson, A., Gordon, P., & Lee, P. (Eds.), International yearbook of history education (pp. 11-29). London: The Woburn Press.

Dawson, R. E., & Prewitt, K. (1969). Political socialization. Boston: Little and Brown Company.

Dean, K. (1997). Politics and the ends of identity. Singapore: Ashgate.

Department of Education, Taiwan Province government (1987). Education in Taiwan Province, Republic of China. Taiwan: Department of Education, Taiwan Province.

Dewey, J (1927). The Public and its problems. New York: Henry Holt.

Dewey, J. (1937). Education and social change. Social Frontier, May 1937, p. 238.

Dewey, J. (1966). Democracy and education. New York: The Macmillan Company.

Domes, Jurgen (1993). The Kuomintang and the Opposition. In Tsang, Steve (Ed.), In the shadow of China: Political developments in Taiwan since 1949 (pp.117-133). Honolulu: University of Hawaii Press.

Dowse, R, E., & Hughes, J. A. (1972). Political sociology. New York: John Wiley & Sons.

Dumas W., & Dumas, A. (1996). Political education in the former German Democratic Republic. The Social Studies, September/October 1996, 197-202.

Edmondson, R. (1996) The 2/28 incident in Taiwan: Ethnicity, opposition, and nation-building. Paper presented at the 1996 North America Taiwan Studies Conference, Michigan State University, MI.

Edward, J. (1985). Language, society and identity. UK: Basile Blackwell.

Ehman, L. H. (1980). The American schools in the political socialization processes. Review of Education Research, 50 (1), 99-119.

Engle, S. H., & Ochoa A. S. (1988). Education for democratic citizenship: Decision making in the social studies. New York: Teacher College Press.





Ernest, P. (1989). The knowledge, beliefs and attitudes of the mathematics teachers: A model. Journal of Education for Teaching, 15, 13-34.

Evans, R. W. (1988). Lessons from history: teacher and student conceptions of the meaning of history. Theory and Research in Social Education, 16 (3), 203-255.

Evans, R. W. (1989). Teacher conceptions of history. Theory and Research in Social Education, 17 (3), 210-240.

Evans, R. W. (1990). Teacher conceptions of history revisited: Ideology, curriculum, and student belief. Theory and Research in Social Education, 18 (2), 101-138.

Evans, R. W. (1993). Ideology and the teaching of history: Purposes, practices, and students beliefs. In J. Brophy (Ed.), Advances in Research on Teaching: Case studies of teaching and learning in social studies (pp. 179-218). London: JAI Press INC.

Evans, R. W., & Pang, V. O. (1995). National standards for United States history: The storm of controversy continues. The Social Studies, November/ December 1995, 270-274.

Fagerlind, I., & Saha, L. J. (1983). Education and national development. Oxford: Pergamon Press.

Farnen, R. F. (1994). Nationalism, ethnicity, and identity. New Brunswick: Transaction publisher.

Feiman-Nemser, S., & Fatherstone, H. (Eds.) (1992). Exploring teaching: Reinventing an introductory course. New York: Teachers College Press.

Feiman-Nemser, S., & Remillard, J. (1996). Perspectives on Learning to Teach. In Murray, F. B. (Ed.), The teacher educator's handbook: Building a knowledge base for the preparation of teachers (pp. 63-91). San Francisco: Jossey-Bass Publishers.

Ferrell, R. (1969). Taiwan aboriginal groups: Problems in cultural and linguistic classification. Taipei: Institute of Ethnology Academia Sinica.

Fleury, S. C. (1998). Social studies, trivial constructivism, and the politics of social knowledge. In Larochelle, M., Bednarz, N., & Garrison (Eds.), Constructivism and education (pp. 156-172). London: Cambridge University Press.

Fu, Jen-kun (1992). Taiwan and the geopolitics of the Asian-American dilemma. New York: Praeger.

Garcia-Ramon, M. D., & Nogue-Font, J. (1994). Nationalism and geography in Catalonia. In David Hooson (Ed.), Geography and national identity (pp. 197-209)

Cambridge, S. S. A.: Blackwell.

Giarelli, J. M. (1983). The public, the state, and the civic education of teachers. The Journal of Teacher Education, 34 (6), p. 57.

Gilbert, R. (1989). Text analysis and ideology critique of curricular content. In Suzanne de Castell, Allen Luke, & Carmen Luke (Eds.), Language, authority, and criticism: Readings on the school textbook (pp. 61-73). New York: The Falmer Press.

Giroux, H. A. (1985). Teachers as transformative intellectuals. Social Education, May 1985, 376-379.

Glaser, B. G., & Strauss, A. L. (1967). The discovery of grounded theory: Strategies for qualitative research. New York: Aldine.

Gold, Thomas B. (1986). State and society in the Taiwan miracle. New York: M. E. Sharpe Inc.

Gold, Thomas B. (1993). Taiwan's quest for identity in the shadow of China. In Tsang, Steve (Ed.), In the shadow of China (pp. 169-192). Honolulu: University of Hawaii Press.

Goodman, J. (1992). Elementary schooling for critical democracy. Albany: State University of New York Press.

Government Information Office of the ROC (1989). The Republic of China Yearbook, 1988. Taipei: GIO.

Government Information Office of the ROC (1992). The Republic of China Yearbook, 1991. Taipei: GIO.

Government Information Office of the ROC (1995). A brief introduction to the Republic of China. Taipei: GIO.

Grabtree, C. (1989). Returning history to the elementary schools. In Paul Gagnon, & The Bradley Commission on History in Schools (Eds.), History literacy (pp. 173-187). New York: Macmillan Publishing Company.

Graff, G (1992). Beyond the cultural wars: How teaching the conflicts can revitalize American education. New York: W. W. Norton & Company.

Grossman, P. L. (1990). The making of a teacher. New York: Teacher college press.

Grossman, P. L., Wilson, S. M., & Shulman, L. S. (1989). Teachers of substance: subject matter knowledge for teaching. In Reynolds, M. C. (Ed.), Knowledge base for the

beginning teacher (pp. 23-36). New York: Pergamon Press.

Halbeisen, Hermann (1993). In Search of a New Political Order?: Political reform in Taiwan. In Steave Tsang (Ed.) In the shadow of China: Political developments in Taiwan since 1949 (pp.73-100). Honolulu: University of Hawaii Press.

Hahn, C. L. (1998). Becoming political: Comparative perspectives on citizenship education. NY: State University of New York Press.

Hammersley, M., & Atkinson, P. (1983). Ethnography: Principles and practice. New York: ROUTLEDGE.

Hashweh, M. Z. (1987). Effects of subject matter knowledge in teaching biology and physics. Teaching and Teachers Education, 3, 109-120.

Harwood, A. M. (1992). Classroom climate and civic education in secondary social studies research: Antecedents and findings. Theory and Research in Social Education, 20 (1), 47-86.

Her, Kelly (1997). Education revamped. Free China Review, July 1997, p. 32-39.

Hess, R. D., & Torney, J. V. (1967). The development of political attitudes in children. Chicago: Aldine.

Hexter, J. H. (1971). The history primer. New York: Basic Books Inc.

Hickey, D. V. (1997). U. S. policy and Taiwan's bid to rejoin the United Nations. Asian Survey, 37 (11), 1031-1043.

Holt, T. C. (1990). Thinking historically: Narrative, imagination, and understanding. New York: College Entrance Examination Board.

Honigman, J. H. (1982). Sampling in ethnographic fieldwork. In R. G. Burgess (Ed.), Field Research: A source book and field manual (pp. 79-90). New York: Routledge.

Hood, S. J. (1996). Political change in Taiwan. Asian Survey, 36 (5), 468-482.

Hood, S. J. (1997). The Kuomintang and the democratization of Taiwan. Colorado: Westview Press.

Hosie, P. (1986). Some theoretical and methodological issues to consider when using interviews for naturalistic research. Austrian Journal of Education, 30 (2), 200-211.

Huang, Huang-ping, & Chiu, Lian-hwang (1991). Moral and civic education. In Smith, D. C. (Ed.), The Confucian continuum (pp. 367-429). New York: PRAEGER



Hsiao, Hsin-huang (1991). The changing state-society relation in the ROC: Economic change, the transformation of the class structure, and the rise of social movements. In Ramon H. Myers (Ed.), Two societies in opposition: the Republic of China and the People's Republic of China after forty years (pp. 127-140). Stanford, C. A.: Hoover Institution Press.

Hsieh, Chiao-min (1964). Taiwan: Ilha Formosa. Washington: Butterworths.

Hsieh, Shih-chung (1994). From Shanbao to Yuanzhumin: Taiwan aborigines in transition. In Rubinstein, M. A. (Ed.), The other Taiwan: 1945 to the present (pp. 404-421). Stanford, C. A.: Hoover Institution Press.

Hsu, Cho-yun (1980). The Chinese settlement of I-lan plain. In Knapp, R. G. (Ed.), China's island frontier: Studies in the historical geography of Taiwan (pp. 69-86). Honolulu: The University Press of Hawaii.

Hsu, Wen-Hsing (1980). From aboriginal island to Chinese frontier: The development of Taiwan before 1683. In Ronald G Knapp (Ed.), China's island frontier: Studies in the historical feography of Taiwan (pp.3-28). Honolulu: The University Press of Hawaii.

Hughes, C. (1997). Taiwan and Chinese nationalism: National identity and status in international society. New York: Routledge.

Husbands, C. (1996). What is history teaching? Philadelphia: Open University Press.

Jenkins, K. (1991). Re-thinking history. New York: Routledge.

Jenness, D. (1990). Making sense of social studies. New York: Macmillan Publishing Company.

Kagan, D. M. (1992). Implications of research on teacher belief. Educational Psychologist, 27 (1), 65-90.

Kammen, M. (1987). Selvages and biases: The fabric of history in American culture. London: Cornell University Press.

Kaufman, S. R. (1994). In-depth interviewing. In Gubriuma, J. F., & Sankar, A. (Eds.), Qualitative methods in aging research (pp. 123-136). California: Sage.

Kaye, L (1989). Separatist sentiments: Independence issue dominates election campaign. Far Eastern Economic Review, November 1989, p. 38.

Kelly, T. E. (1986). Discussing controversial issues: Four perspectives on the teacher's role. Theory and Research in Social Education, 14 (2), 113-138.

- Kennedy, K. J. (1991). The historical perspective: The contribution of history to citizenship education. In Gross, R. E., & Dynneson, T. L. (Eds.), Social science perspectives on citizenship education (pp. 66-87). New York: Teachers College Press.
- Kennedy, M. M. (1991). An agenda for research on teacher learning. East Lansing, MI: National Center for Research on Teacher Learning
- Kerr, G. H. (1965). Formosa betrayed. Boston: Houghton Mifflin company.
- Kerr, G. H. (1974). Formosa: Licensed revolution and the home rule movement 1895-1945. Honolulu: The University Press of Hawaii.
- Kessing, R. M. (1981). Cultural anthropology: A comparative perspective. New York: Holt, Rinehart and Winston.
- Kim, S. S., & Dittmer, L. (1993). Whether China's quest for national identity? In Kim, S. S., & Dittmer, L. (Eds.), China's quest for national identity ( pp. 237-290). London: Cornell University Press.
- Kobrin, D. (1992). It's my country, too: A proposal for a student historian's history of the United States. Teacher College Record, 94 (2), 329-342.
- Kon, J. H. (1995). Teachers' curricular decision making on response to a new social studies textbook. Theory and Research in Social Education, 23 (2), 121-146.
- Lai, Tse-han, Myers, R. H., & Wei, Wou. (1991). A tragic begging: the Taiwan uprising of Feburaru 28, 1947. C.A.: Stanford University Press.
- Lareau, A. (1989). Home advantage: Social class and parental intervention in elementary education. London: The Falmer Press.
- Laster, Martin L. (1990). A step toward democracy. Wasington D. C.: Publisher for the American Enterprise Institute.
- Le Page, R. B., & Tabouret-Keller A. (1985). Acts of identity. Cambridge: Cambridge University Press.
- Lee, Teng-hui (1990). Opening a new era for the Chinese people. In Lee, Teng-hui (1996), Peace through democratic reforms (pp. 91-98). Taipei: Wen Ying Tang Press Inc.
- Lee, P. (1995). History and the national curriculum in England. In Dickinson, A., Gordon, P., & Lee, p. (Eds.), International yearbook of history education (pp.73-123). London: The Woburn press.

Lee, Teng-hui (1996). Peace through democratic reforms. Taipei: Wen Ying Tang Press Inc.

Leinhardt, G (1994). History: A time to be mindful. In Leinhardt, G., Beck, I, L, & Stainton, C. (Eds.), Teacher and learning in history (pp. 209-256). NJ: Lawrence Erlbaum Associates, Publishers.

Leming, J. S. (1985). Research on social studies curriculum and instruction: interventions and outcomes in the social-moral domain. In William B. Stanly (Ed.), Review of research in social studies education: 1976-1983 (pp. 123-194). Washington, D. C.: National Council for the Social Studies.

Leming, J. S. (1991). Teacher characteristics and social studies education. In J. P. Shaver (Ed.), Handbook of research on social studies teaching and learning ( pp. 222-236). New York: Macmillan publishing company.

Leng, Shao-chuan (1993). Chiang Ching-kuo's leadership in the development of the Republic of China on Taiwan. New York: University press of America.

Leng, Shao-chuan, & Lin, Cheng - yi (1993). Political change on Taiwan: Transition to democracy? The China Quarterly, (136), 805-839.

Levstik, L. S., & Barton, K. C. (1996 a). They still use some of their past: Historical salience in elementary children's chronological thinking. Curriculum Studies, 28 (5), 531-576.

Levstik, L. S., & Barton, K. C. (1996 b). Doing history: Investigating with children in elementary and middle schools. NJ: Lawrence Erlbaum Associates, Inc.

Li, D. L. (1965). The ageless Chinese: A history. New York: Charles Scribner's sons.

Lin, Chia-lung (1996). Nationalisms and democratic consolidation in divided societies: A comparative analysis of the elite and mass in Taiwan. Paper presented at the second annual north American Taiwan Studies conference, May 24-26, 1996, Michigan State University.

Lin, C. C. (1963). Geology and ecology of Taiwan prehistory. Asian Perspectives, 7, 203-213.

Lin, Tsung-kuang (1992). A stalled democratic movement: A Report on the December election Taiwan. In Hsu, Chung Y., & Chang Parris (Eds.), The 1991 National Assembly election in Taiwan (pp. 8-34). IL: North America Taiwanese Professors' Association.

Lomas, T (1990). Teaching and assessing historical understanding. London: Historical



Association.

Long, S. (1991). Taiwan: China's last frontier. London: Macmillan.

Longstreet, W. S. (1985). Citizenship: The phantom core of social studies curriculum. Theory and Research in Social Education, 13 (2), 21-29.

Lortie, D. (1975). Schoolteacher. Chicago: University of Chicago Press.

Lumley, F. A. (1976). The republic of China under Chiang Kai-shek: Taiwan today. London: Barrie & Jenkins.

Lu, Ya-li (1991). Political modernization in the ROC: the Kuomintang and the inhibited political center. In Ramon H. Myers (Ed.), Two societies in opposition: the Republic of China and the People's Republic of China after forty years (pp.111-126). Stanford, C. A. : Hoover Institution Press.

Lumley, F. A. (1976). The Republic of China under Chiang Kai-shek. London: Barrie & Jenkins Limited.

Lynch, J. (1992). Education for citizenship in multicultural society. New York: Cassell.

Martin, R. (1982). The socialization of children in China and on Taiwan: An analysis of elementary school textbooks. In Altbach, P. G., Arnove, R. F., & Kelly, G. P. (Eds.), Comparative education. New York: Macmillan publishing Co., Inc.

McNeil, L. M. (1986). Contradictions of control: School structure and school knowledge. New York: Routledge & Kegan Paul.

Mendel, D. (1970). The politics of formosan nationalism. Los Angeles: University of California.

Merriam, S. B. (1988). Case study research in education: A qualitative research.

Merryfield, M. M., & Tlou, J. (1995). The process of Africanizing the social studies: Perspectives from post-independence curricular reform in Botswana, Kenya, Malawi, Nigeria, and Zimbabwe. The Social Studies, November/December 1995, 260-269.

Metraux D. (1991). Taiwan's political and economic growth in the late century. Lewiston: The Edwin Mellen Press.

Miles, M. B., & Huberman, A. M. (1994). Qualitative data analysis. London: SAGE Publications.

Ministry of education (1976). Education in the Republic of China. Taiwan: Ministry of Education.

Moody, P. R. (1991). Political change on Taiwan: A study of ruling party adaptability. New York: Praeger.

Morris, P., Clelland G. M., & Wong, Ping-man (1997). Explaining curriculum change: Social studies in Hong Kong. Comparative Education Review, 41 (1), 27-43.

Myers, R. H. (1987). Political theory and recent political developments in the Republic of China. Asian Survey, 27 (9), 1003-1022.

Meyer, J. E. (1988). Teaching morality in Taiwan schools: The message of the textbooks. The China Quarterly, (114), 267-282.

Nash, G. B., Crabtree, C , & Dunn, R. E. (1998). History on trial: Cultural wars and the teaching of the past. New York: ALFRED A. KNOFF.

Nathan, A. J., & Ho, Helena V. S. (1993). Chiang Ching-kuo's decision for political reform. In Jeng, Shao-chuan (Ed.), Chiang Ching-kuo's leadership in the development of the Republic of China on Taiwan (pp. 31-55). New York: University Press of America.

National Center for History in the Schools (1994). National standards for history for grades K-4. Los Angeles: National Center for History in the Schools.

Nespor, J. (1987). The role of beliefs in the practice of teaching. Curriculum Studies, 19 (4), 317-328.

Pajares, M. F. (1992). Teachers' beliefs and educational research: Cleaning up a messy construct. Review of Educational Research, 62 (3), 307-332.

Parekh, B. (1994). Discourse on national identity. Political Studies, 42 (3), 492-504.

Parker, W. C. (1987). Teachers' mediation in social studies. Theory and Research in Social Education, 15 (1), 1-22.

Parker, W., & Jarolimek, J. (1984). Citizenship and the critical role of the social studies. Washington, D. C.: National Council for the Social Studies.

Patton, M. Q. (1980) Qualitative evaluation and research methods. Newbury Park, CA: SAGA.

Peng, Ming-min (1972). A taste of freedom: Memories of a Formosan independence leader. New York: Holt, Rinehart & Winston.

Peshkin, Alan (1985). Virtuous Subjectivity: In the Participant-Observer's I's. In David N. Berg, & K. K. Smith (Eds.), Exploring clinical methods for social research (pp. 267-281). London: SAGE Publication.

Preskill, s (1997). Discussion, schooling, and the struggle for democracy. Theory and Research in Social Education, 25 (3), 316-345.

Preston, P. W. (1997). Political /cultural identity: Citizens and nations in a global era. London: SAGE Publications.

Pye, L. W. (1971). Identity and the political culture. In Pye, L. W. (Ed.), Crises and sequences in political development (pp. 101-134). NJ: Princeton University Press.

Ramon H. Meyers (Ed.) (1989). A Unique Relationship: The United States and the Republic of China Under the Taiwan Relations Act. California: Hoover Institution Press.

Ravitch, D. (1988). Tot sociology. American Educator, Fall 1988, 38-39.

Raywid, M. A. (1980). The discovery and rejection of indoctrination. Educational Theory, 30 (1), 1-10.

Reed, L. W. (1989). For better elementary teaching: Methods old and new. In P. Gagnon (Ed.), History literacy: The case of history in American education (pp. 302-319). New York: Macmillan.

Riessman, C. K. (1993). Narrative analysis. London: SAGE.

Robbins, K. (1990). National identity and history: Past, present and future. History, 75 (24), 369-387.

Rokeach, M. (1968). Beliefs, attitudes, and values. San Francisco: Jossey-Bass Inc., Publishers.

Rustow, D. A. (1967). A world of nations: Problem of political modernization. Washington D. C.: The Brooking.

Schiffrin, Horold Z. (1968). Sun Yat-sen and the origins of the Chinese Revolution. California: University of California Press.

Schwab, J. J. (1978). Education and the structure of the disciplines. In I, Westbury, & N. J. Wilkof (Eds.), Science, curriculum, and liberal education (pp. 229-272). Chicago: University of Chicago Press.

Schwille, J., Porter, A., Belli, G., Floden, R., Freeman, D., Knappen, L., Kuhs, T., & Schmidt, W. (1983). Teachers as policy brokers in the content of elementary school

mathematics. In L. Shulman, & G. Sykes (Eds.), Handbook of teaching and educational policy (pp. 370-391). New York: Longman.

Scollon, R. (1998). Hong Kong language in context: The discourse of Ch's. In Martha C. Pennington (Ed.), Language in Hong Kong at century's end (pp. 277-281). Hong Kong: Hong Kong University Press.

Shavelson, R. J., & Stern, P. (1981). Research on teachers' pedagogical thoughts, judgments, decisions, and behaviors. Review of Educational Research 51(4), 455-498

Shulman, L. (1986). Those who understand: Knowledge growth in teaching. Educational Researcher, 15 (2), 4-14.

Shulman, L. S. (1987). Knowledge and teaching: Foundations of the new reform. Harvard Educational Review, 57 (1), 1-22.

Sih, K. T. (Ed.) (1973). Taiwan in modern times. St. John's University Press.

Skilbeck M. (1985). Social and cultural factors affecting curriculum. In Torsten Husen (Ed.), The international encyclopedia of education: Research and studies Vol. 8 (pp. 4608-4612). London: Pergamon.

Smith, A. D. (1991). National identity. England: Penguin Book.

Smith, D. C. (1991). Foundations of modern Chinese education and the Taiwan experience. In D. C. Smith (Ed.), The Confucian continuum: Educational modernization in Taiwan ( pp. 1-64). New York: PRAGER.

Spoehr, K. T., & Spoehr, L. W. (1994). Learning to think historically. Educational Psychologist, 29 (2), 71-77.

Su, Bing (1986). Taiwan's 400 year history: The origins and continuing development of the Taiwanese society and people. New York: The Taiwanese Cultural Grass Roots Association, Inc.

The United States Department of State (1967). The China White Paper. California: Stanford University Press.

Thornton, S. J. (1988). Curriculum consonance in United States history classrooms. Journal of Curriculum and Supervision, 3 (4), 308-320.

Thornton, S. J. (1990). Should we be teaching more history? Theory and Research in Social Education, 18 (1), 53-60.

Thornton, S. J. (1991). Teachers as curricular-instructional gatekeeper in social studies.

In Shaver, J. P. (Ed.), Handbook of research on social studies. New York: Macmillan.

Tien, Hung-mao (1988). Social change and political development in Taiwan. In Harvey Feldman, Michael Kau, & Ilpyong J. Kim (Eds.), Taiwan in a time of transition (pp. 1-38). New York: Paragon House.

Tien, Hung-mao (1992). Taiwan's evolution toward democracy: A historical perspective. In Denis F. Simon, & Michael Y. M. Kau (Eds.), Taiwan: Beyond the economic miracle (pp. 3-23). New York: East Gate Book.

Tien, Hung-mao (1993). Dynamics of Taiwan's democratic transition. In Steaven Tsang (Ed.), In the shadow of China: Political developments in Taiwan since 1949 (pp. 101-116). Honolulu: University of Hawaii Press.

Tien, Hung-mao (1996). Taiwan in 1995: Electoral politics and cross-strait relations. Asian Survey, 36 (1), 33-40.

Torney-Purta, J., Schwille, J., & Jo-Ann, A. (Eds.) (1999). Civic education across countries: Twenty-four national case studies from the IEA civic education project. The International Association for the Evaluation of Educational Achievement.

Tsai, Ching-tien (1997). Curriculum reform in a context of political authority: A case study of social studies curriculum innovation. Humanities and Social Sciences, 7 (3), 320-333. Taiwan: National Science Council of the ROC.

Ts'ai, Ling, & Myers, R. H. (1990). Winds of democracy: The 1989 Taiwan elections. Asian Survey, 30 (4), 360-379.

Tsang, Steaven (1993). Chiang Kai-shek and the KMT's policy to reconquer the Chinese mainland, 1949-1958. In Steven Tsang (Ed.), In the shadow of China (pp. 48-72). Honolulu: University of Hawaii Press.

Tsurumi, E. P. (1977). Japanese colonial education in Taiwan, 1895-1945. Harvard University Press.

Tyack, D. B. (1976). Ways of seeing: An essay on the history of compulsory schooling. Harvard Educational Review, 46(3), 355-389.

Verba, S. (1965). Comparative political culture. In Pye, L. W., & Verba, S. (Eds.), Political culture and political development (pp. 512-560). NJ: Princeton University Press.

Wachman, A. M. (1994). Taiwan: National identity and democratization. New York: M. E. Sharpe.

Walker, R. (1973). Taiwan's movement into political modernity. In Sih K. T. (Ed.) Taiwan in modern times (pp. 359-395). St. John's University Press.

Wang, I-shou (1980). Cultural contact and the migration of Taiwan's aborigines: A historical perspective. In R. P. Knapp (Ed.), China's island frontier (pp. 31-54). Hawaii: The University Press of Hawaii.

Wasburn, P. C. (1986). The political role of the American school. Theory and Research in Social Education, 14 (1), 51-65.

White, J. J., & Shearer Rumsey (1993). Teaching for understanding in a third-grade geography Lesson. In Jere Brophy (Ed.), Advances in research on teaching, Vol. 4, 33-69. London: JAI PRESS INC.

Wilson, R. W. (1970). Learning to be Chinese. Massachusetts: The M. I. T. Press.

Wislon, S. M., Shulamn, L. S., & Richert, A. E., (1987). "150 different ways" of knowing: Representations of knowledge in teaching. In J. Calderhead (Ed.), Exploring teachers' thinking (pp. 104-124). London: Cassell.

Wilson, S. M. (1988). Understanding historical understanding: Subject matter knowledge and the teaching of U. S. history. Unpublished doctoral dissertation, Stanford University, Palo Alto, CA.

Wilson, S. M., & Wineburg, S. S. (1988). Peering at history through different lens: the role of disciplinary perspective in teaching history. Teaching College Record, 89 (4), 525-539.

Wilson, S. M. (1990). A conflict of interests: The case of Mark Black. Educational Evaluation and Policy Analysis, 12 (3), 309-326.

Wineburg, S. S., & Wilson, S. M. (1991). Subject matter knowledge in the teaching of history. In J. E. Brophy (Ed.), Advances in research on teaching, Vol. 2, 303-345. Greenwich, CT: JAI.

Wilson, S. M., & McDiarmid, G. W. (1996). Something old, something new: What do social studies teachers need to know? In Murray, F. B. (Ed.), The teacher educator's handbook: Building a knowledge base for the preparation of teachers (pp. 295-319). San Fransico: Jossey-Bass Publishers.

Winckler E. A. (1984). Institutionalization and participation on Taiwan: From hard to soft authoritarianism? The China Quarterly, September 1984, 482-499.

Winckler, E. A. (1994). Cultural policy on postwar Taiwan. In S. Harrell, & Huang, Chun-chieh (Eds.), Cultural change in postwar Taiwan. Boulder: Westview Press.

Wineburg, S. S. (1996). The psychology of learning and teaching history. In Berliner, D. C., & Calfee, R. C. (Eds.), Handbook of educational psychology (pp. 423-437). New York: Simon & Schuster Macmillan.

Wirt, F. M., & Kirst, M. W. (1982). School in conflict. Berkeley: McCutchan.

Wu, David Yen-ho (1994). The Construction of Chinese and Non-Chinese Identities. In Tu, Wei-Ming (Ed.), The living tree: The changing meaning of being Chinese today. California: Stanford University Press.

Wu, Nai-teh (1995). Ethnic consciousness, political support, and national identity: A preliminary analysis of the political ideologies among ethnic groups in Taiwan. In Taiwan Studies, 1 (2), Chang, Mau-kuei, & Bosco, J. (Eds.), Ethnic relations and national identity in Taiwan, pp 45-66. NY: M. E. Sharpe Inc.

Wu, Yu-shan (1989). Marketization of politics: The Taiwan experience. Asian Survey, 29 (4), 382-400.

Wu, Yu-shan (1995). Taiwan in 1994: Managing a critical relationship. Asian Survey, 35 (1), 61-69.

Young, Yi-rong (1995). School as the epitome of the society: Education and social change in Taiwan. In Gerard A. Postiglione, & Lee Wing On (Eds.), Social change and educational development: Mainland China, Taiwan and Hong Kong, pp. 120-128. Hong Kong: The University of Hong Kong.

Yu, G. T., & Longenecker, D. J. (1994). The Beijing-Taipei struggle for international recognition. Asian Survey, 34 (5), 475-488.

Zhan, Jun (1993). Ending the Chinese civil war: Power, commerce, and conciliation between Beijing and Taipei. New York: St. Martin's Press.





## LIST OF REFERENCES (IN CHINESE)

Association for Studying Taiwan history (臺灣史研究會) (Ed.) (1997). Examining the textbook: Knowing about Taiwan (教科書: 認識臺灣). Taipei: Association for Studying Taiwan History.

Blusse, Leoard (包樂史) (1994). Searching for the origin of Taiwanese society: A research report by a Holland scholar who studies Taiwan history (追尋被遺忘的臺灣社會之本源: 一個荷蘭臺灣史學者的研究報告). Contemporary (當代), November 1994, (103), 70-91.

Chang, Chun-hsing (張春興) (1988). Criticisms to the elementary school textbooks (對小學教科書的批評). China Times, April 4, 1988.

Chang, Mau-kuei (張茂桂) (1992). Problems on provincialism and nationalism (省籍問題與民族主義). In Chang, Mau-kuei (張茂桂) (Ed.) Relationships between ethnic groups and national identity (族群關係與國家認同) (pp. 233-279). Taipei: Yeh-chiaang publisher.

Chang, Shiahn-yarn (張憲炎) (1997). The genuine spirit of research on Taiwan history (臺灣史研究的真精神). In Chang, Shiahn-yarn, Lee, Hsiao-feng, & Dai, Baau-tsun (張憲炎, 李筱峰, 戴寶村) (Eds.), A collection of selected essays on Taiwan history, Vol. 2 (臺灣史論文精選 Vol. 2) (pp. 11-26). Taipei: Jade mountain publisher.

Chang, Yarn (張炎) (1970). An examination of the Ching's administration over Taiwan in the early years (清代初選治臺政策的檢討). Historiographical Records of Taiwan (臺灣文獻), 21 (1), 19-36.

Chen, Chuu-rern (陳楚人) (1985). Wu-feheng: A myth of a hero (神話英雄-吳鳳). In Li, Juor-shueei (林濁水) (Eds.), The decline of the Chinese empire (瓦解的華夏帝國) (pp. 8-35). California: Taiwan Publishing Co. Inc.

Chen, Fang-ming (陳芳明) (Ed.) (1991). The collection of historical materials on post-war Taiwan history-the February 28, 1947 event (臺灣戰後史資料選二二八事件專輯).

Taipei: Independence Evening Post Publisher.

Chen, Fang-ming (陳芳明) (1992). Interpreting Taiwan history: A Taiwanese-centered perspective (探索臺灣史觀). Taipei: Independence Evening Post publisher.

Chen, fang-ming (陳芳明) (1993). A peaceful transformation in Taiwan (和平轉變在臺灣). Taipei: Vanguard Publisher.

Chen, Fang-ming (陳芳明) (1996). Cheng Cheng-kung and Shih-larng (鄭成功與施琅). In Chang, Shiahn-yarn, Lee, Hsiao-feng, & Dai, Baau-tsun (張憲炎, 李筱峰, 戴寶村) (Eds.), A collection of selected essays on Taiwan history, Vol. 1 (臺灣史論文精選 Vol. 1) (pp. 135-155). Taipei: Jade mountain publisher.

Chen, Jia-shiouh (陳家秀). National identity, historical consciousness, and history education (國民意識歷史意識歷史教育). Elementary School Education (國民教育), January 1990, 30 (5).

Chen, San-jiing (陳三井) (1990). The Taiwanese view point and evaluation of Cheng, Cheng-kung (臺灣對鄭成功的看法及評價). Guor-wen Tian-dih (the World of Chinese Literature, 國文天地), April 1990, 5 (11), 42-51.

Chen, Shuh-hurng (陳樹鴻) (1988). Taiwanese consciousness -- The cornerstone of Danng-waih's democratization movement (臺灣意識黨外運動的基石). In Shih, Miin-huei (施敏輝) (Ed.), A collection of debate on Taiwanese consciousness (臺灣意識論戰選集) (pp. 191-204). Taipei: Vanguard Publisher.

Chen, yuarn (陳元) (1988). Taiwanese complex and Chinese complex. In Shih, Miin-huei (施敏輝) (Ed.), A collection of debate on Taiwanese consciousness (臺灣意識論戰選集) (pp. 53-57). Taipei: Vanguard publisher.

Chi, Jia-lirn (戚嘉林) (1985). The history of Taiwan (臺灣史) Taipei: Independence Evening Post.

Chiang, Ching-kuo (蔣經國) (1980) Collection of speeches of president Chiang Ching-kuo in 1979 (蔣經國先生六十八年言論集). Taipei: Government Information Office, ROC.

Chiang, Kai-shek, (蔣介石) (1953). Chapters on welfare, education, and health and happiness as supplements to The Three Principles of the People (民生主義育樂兩篇補述). Taipei, Taiwan: China Publishing Co.

Chin, Baau-chir (秦葆琦) (1988) A brief introduction to special features of the experimented curriculum for elementary social studies (國民小學社會科實驗課程特色簡介). The Newsletter of the National Institute for Compilation and Translation (國立編譯館通訊), 2 (1), 4-6.

Chin, Baau-chir (秦葆琦) (1989). A brief introduction to the Baan-chiaur model of curriculum development (板橋模式課程發展). Modern Education (現代教育), 4 (14), 29-39.

Chin, Baau-chir 秦葆琦(1991). Teaching methods of current social studies curricula 新社會科課程教學法. The World of Teachers (教師天地), December, 1991, 55.

Chin, Bau-chir (秦葆琦) (1995) A brief introduction to the new elementary social studies curricula (國民小學社會科新課程簡介). In Teacher Center of Taiwan Province (臺灣省國民學校教師研習會) (Ed.), The spirit and features of the new elementary curriculum standards (國小新課程標準的精神與特色) (pp. 154-170). Taipei: Teacher Center of Taiwan Province.

Chou, Waan-yaau (周婉筠) (1998). Taiwan history: Prehistory to 1945 (臺灣歷史圖說-史前至一九四五年). Taipei: Liarn-jing.

Contemporary (當代) (1997). A seminar on the textbook of knowing about Taiwan: A discussion on history education (從認識臺灣座談歷史教育). Contemporary (當代), August 1997, (120), 52-67.

Contemporary China Research Institute (當代中國研究社) (1972). A collection of the documents on the issue of liberating Taiwan (1949-1971) (解放臺灣文件). Hong Kong: Contemporary China Research Institute.

Dai, Baau-tsun (戴寶村) (1987). A leader of political movement during the Japanese colonial rule era: Lin, Hsien-tang (士紳型政治運動領導者 -- 林獻堂). In Chang,

Shiahn-yarn, Lee, Hsiao-fen, & Juang, Yung-ming (張憲炎, 李筱峰, 莊永明) (Eds.), Introductions of famous figures in modern Taiwan (臺灣近代名人誌 Vol. 4) (pp. 51-76). Taipei: Independent Press.

Dai, Baau-tsun (戴寶村) (1993). History education and national identity: Criticisms of the education of Taiwan history in Taiwan's elementary and middle schools (歷史教育與國家認同國民中小學臺灣史教育之檢討) In A monograph on national identity (國家認同學術研討會論文集). Taipei: The Foundation of Modern Academy and Research.

Duh, Jehng-sheng (杜正勝). A new perspective of interpreting Taiwan history (一個新史觀的誕生), Contemporary (當代), August 1997, (120), 20-31.

Ger, Yuung-guang (葛永光) (1991). Cultural pluralism and national integration (多元文化與國家的融合). Taipei: jehng-jung book store.

Hsu, Shyuee-shiar (徐雪霞) (1992). Review and prospects on research on elementary history educational (我國國小歷史教育研究的回顧與展望). Newsletter for Teaching Humanities and Social Science (人文及社會科學教學通訊), February 1992, 2 (5), 42-58.

Huang, Guang-guor (黃光國) (1986). A socio-psychological analysis of Taiwanese complex and Chinese complex (臺灣結與中國結的社會心理分析). China Forum (中國論壇), October 1986, 23 (2), 26-39.

Huang, Jau-tang (黃昭堂) (1994). The development of Taiwanese Independence Movement and Taiwanese nationalism in the postwar Taiwan (戰後臺灣獨立運動與民族主義的發展). In Shih, Jehng-feng (施正鋒) (Ed.), Taiwanese nationalism (臺灣民族主義) (pp. 195-227). Taipei: Vanguard publisher.

Huang, Jau-tang & Peng, Ming-min (彭明敏 & 黃昭堂) (1995). The status of Taiwan: An analytical perspective based on the international law (臺灣在國際法上的地位). Taipei: Jade mountain publisher.

Huang, Jyuhn-jier (黃俊傑) (1985). Opinions of middle school history teachers towards history education (當前我國國中教師對歷史教育的看法). In Proceedings of

international conference on history education (國際歷史教育研討會論文集) ( pp.319-334). Taipei: National Taiwan Normal University.

Huang, Yarn-peir (黃炎培) (1946). A proposal of Taiwanese education after recovering Taiwan (光復後之臺灣教育案). In The Committee on Educational Research (1991) (Ed.), Educational administrations and conferences: Historical records of annual conference over years (教育行政與會議歷屆全國教育會論編纂與研究 (pp. 392-397). Taipei: Ministry of Education.

Huang, Yu-guan (黃玉冠) (1993). The curriculum development and implementation of local studies - - a case of I-lan (課程發展與鄉土教學-宜蘭). Unpublished master's thesis, The National Taiwan Normal University, Taipei, Taiwan.

Juang, Wahn-shouh (莊萬壽) (1996). China (中國論). Taipei: Jade mountain publisher.

Lee, Guor-chir (李國祁) (1977). The purposes and mission of history education (歷史教育的目的與使命) Modern China (近代中國), 3 (19), 41-46.

Lee, Hsiao-feng (李筱峰) (1995). Taiwan, my choice! (臺灣, 我的選擇!). Taipei: Jade mountain publisher.

Lee, Hsiao-feng & Liu, feng-sung (李筱峰 & 劉峰松) (1996). Overview of Taiwan history (臺灣歷史閱覽). Taipei: Independent Evening Post.

Lee, Teng-hui (李登輝) (1994). Speech to KMT annual retrospective, China Times, 31 December, 1994.

Lee, Teng-hui (李登輝) (1994). Manage big Taiwan (經營大臺灣). Taipei: Yuan-liu publisher.

Lin Bur-wei (林柏維) (1993). The great changes over years of Taiwanese Cultural Association (臺灣文化協會滄桑). Taipei: Tai-yuarn publisher.

Lin, Yuh-tii (林玉体) (1987). The Features of Taiwan's education for the four decades (臺灣教育面貌四十年). Taipei: Independence Evening Post.

Lin zhao-xian (林昭賢) (1995). The implementation of the teaching of local culture in Taipei (臺北市鄉土教育的實施). In Huang, Jeng-lie, & Lee, Long-sheng (黃政嶸 & 李隆盛) (Eds.), Teaching local cultures (鄉土教育) (pp. 66-86). Taipei: Han-wen Bookstore.

Lyu, Ruo-yu (呂若瑜) (1994). A research on curriculum development of the elementary school social studies (我國國民小學社會科課程發展之研究) Unpublished master's thesis, National Taiwan Normal University, Taipei, Taiwan.

Ministry of Education (教育部) (1953). The elementary school curriculum standards (國民學校課程標準) Taipei: Zhong-chung bookstore.

Ministry of Education (教育部) (1957). The Yearbook of Education of the ROC (中華民國教育年鑑). Taipei: the Ministry of Education.

Ministry of Education (教育部) (1968). The elementary school curriculum standards (國民學校課程標準). Taipei: Jehng-jung book store.

Ministry of Education (教育部) (1976). The elementary school curriculum standards (國民學校課程標準). Taipei: Jehng-jung book store.

Ministry of Education (教育部) (1993). The curriculum standards of the elementary school (國民小學課程標準). Taipei: Tai-Jier Publisher.

National Institute for Compilation and Translation (國立編譯館) (1958). Chinese language text (國語課本), Vol. 3. Taipei: National Institute for Compilation and Translation.

National Institute for Compilation and Translation (國立編譯館) (1960). Chinese language text (國語課本), Vol. 9. Taipei: National Institute for Compilation and Translation.

National Institute for Compilation and Translation (國立編譯館) (1968). social studies text (社會課本), Vol. 1. Taipei: National Institute for Compilation and Translation

National Institute for Compilation and Translation (國立編譯館) (1972). Chinese language text (國語課本), Vol. 11. Taipei: National Institute for Compilation and Translation

National Institute for Compilation and Translation (國立編譯館) (1978). Teachers' manual, social studies (社會科教師手冊). Taipei: National Institute for Compilation and Translation

National Institute for Compilation and Translation (國立編譯館) (1985). Teachers' manual, social studies (社會科教師手冊). Taipei: National Institute for Compilation and Translation

National Institute for Compilation and Translation (國立編譯館) (1991). social studies text (社會課本), Vol. 7. Taipei: National Institute for Compilation and Translation.

National Institute for Compilation and Translation (國立編譯館) (1991). social studies text (社會課本), Vol. 8. Taipei: National Institute for Compilation and Translation.  
National Institute for Compilation and Translation (國立編譯館) (1991). social studies text (社會課本), Vol. 11. Taipei: National Institute for Compilation and Translation.

National Institute of Compilation and Translation (國立編譯館) (1993). Social studies text (社會課本), Vol. 7. Taipei: National Institute for Compilation and Translation

National Institute for Compilation and Translation (國立編譯館) (1993). Teachers' manual, social studies (社會科教師手冊), Vol. 7. Taipei: National Institute of Compilation and Translation.

Ou, Yung-sheng (歐用生) (1985). An analysis on ideology in elementary school social studies textbooks (國小社會科教科書意識型態之分析). In Hsing-chu teacher college press, 1985. Taiwan: Hsing-chu teacher college.

Ou, Yung-sheng (歐用生) (1989). Qualitative research (質的研究). Taipei: Shi-da book store.

Ou, Yung-sheng (歐用生) (1990). An analysis on hidden curriculum in the Elementary social studies in Taiwan (國小社會科潛在課程). Unpublished doctoral dissertation of

Taiwan national normal university, department of education.

Ou, Yung - sheng (歐用生) (1995). The prospect of the implementation of the new curriculum for elementary school (展望國小新課程標準的實施). In Teacher Center of Taiwan Province (Ed.) The spirit and features of the new curriculum standards for elementary school (國民小學新課程標準的精神與特色) (pp. 44-54). Taipei: Teacher Center of Taiwan Province.

Pen, Hsing-yi (黃馨儀) (1993). Love Taipei with all your heart (用心愛臺北). In Teaching local culture (鄉土教學) (pp. 1-4). Taipei: Teachers' in-service training center in Taipei.

Peng, Jian-when (彭堅汶) (1992). National identity and political development in current Taiwan (國家認同與當前的政治發展) Modern China (近代中國), 87, February 1992.

Shiau, Shing-huang (蕭新煌) (1988). A biased perspective presented in textbooks (教科書的偏見). United Daily News, April, 5, 1988.

Shih, Jehng-feng (施正鋒) (1998). Ethnic groups and nationalism (族群與民族主義) Taipei: Vanguard publisher.

Shih, Ming-te (施明德)(1988). Shih Ming-te's political will: The last testament on the military trial for mei-li-dau event (施明德的政治遺囑: 美麗島軍法大審最後答辯文). Taipei: Vanguard publisher.

Shing, tsai-Tair (辛在台) (1998). The discourse on neo-Taiwanese (新臺灣人論述) Central Daily News, December 31, 1998.

Shyr, Jih-sheng (石計生) (1993). Ideology and Taiwan's textbooks (意識型態與臺灣教科書). Taipei: vanguard publisher.

Shyue, Hsiao-huar (薛曉華) (1995). The grass-rooted educational reform in Taiwan: An analysis on the state and social force (臺灣民間教育改革運動: 國家與社會力的分析). Taipei: Vanguard publisher.



Sun, Bang-jeheng (孫邦正) (1970). Problems of Chinese education (中國教育問題). Taipei: Shang-wuh bookstore.

Sun, Yat-sen (孫中山) (1924). The outline for national build (建國大綱). In A collection of the national father's though (1974) (pp. 156-157). Taipei: Culture University Press.

Sun, Yat-sen (孫中山) (1953). The Principle of Nationalism (民族主義). Taipei: China Cultural Service.

Sun, Yat-sen (孫中山) (1985). The Three Principle of People (三民主義). Taipei: China Cultural Service.

Sung, Dung-yarng (宋冬陽) (1988). A problem on current stage of Taiwanization of Taiwanese literature (現階段臺灣文學本土化的問題). In Shih, Miin-huei (施敏輝) (Ed.), A collection of debate on Taiwanese consciousness (臺灣意識論戰選集) (pp. 207-249). Taipei: Vanguard Publisher

Sy Farn (思帆) (1991). A critique of Taiwanese literature and Taiwanese consciousness (試論臺灣文學與臺灣意識). China Forum (中國論壇), October 1991, 32 (1), 65-70.

Tarng, Shiarn-lurng (唐賢龍) (1947). The main cause of the Taiwan event of February 28 (臺灣事變的主因). In Chen Fang-ming ((陳芳明) (Ed.) (1991). The collection of historical materials on post-war Taiwan history-the February 28, 1947 event (臺灣戰後史資料選二二八事件專輯). Taipei: Independence Evening Post Publisher.

The Democratic Progress Party (民進黨) (1995) The DPP's election campaign outline: Please give the DPP a chance (給民進黨一個機會). Taipei: Vanguard publisher.

The Historical Research Commission of Taiwan Province (臺灣省文獻委員會) (1991 & 1992) (Ed.). The historiographical records of the event of February 28, 1947 (二二八事件文獻輯錄). Taipei: The Historical Research Commission of Taiwan Province.

Wang, Fu-chang (王甫昌) (1992) An essential character of ethnic assimilation (省籍融合的本質). In Chang, Mau-kuei (張茂桂) (Ed.), Relationships among thnic groups and national identity (族群關係與國家認同) (pp. 53-100). Taipei: Yeh-chiaang publisher.

Wang, Fu-chang (王甫昌) (1994). Ethic assimilation and mobilization: An analysis of party support in Taiwan (族群同化與動員：臺灣民眾政黨支持之分析). *Bulletin of the Institute of Ethnology, Academia Sinica*, Spring 1994, (77), 1-34.

Weih, Shu-erl (魏書娥) (1991). A historical reflection on the Taiwan history study: An interview with three historians (臺灣史研究的歷史反省). *China Forum (中國論壇)*, 31 (11), Autumn, 1991, 41-49.

Weng, Jia-yin, Shyue, huah-yuarn, Liu, Yuhn-lih, & Sheen, Tzung-shiahn (翁佳音, 薛化元, 劉燕儷, 沈宗憲) (1992). Analyses on texts about general history of Taiwan (臺灣通史類著作解題與分析). Taipei: Yeh-chiarng publisher.

Wu, Mih-char (吳密察) (1993). Taiwanese people's illusion and the February 28 event: De-colonization in Taiwan (臺灣人的夢與二二八事件：臺灣的脫殖民地化). *Contemporary (當代)*, July 1993, (87), 30-45.

Wu, Mih-chir (吳密察) (1994 a). An examination of social studies textbook on history section (社會科歷史). In Wu, Mih-chir & Jaing, Wen- yur (吳密察 & 江文瑜) (Ed.), The examination on textbooks for the elementary school social studies (體檢國小教科書) (pp. 116-120). Taipei: Vanguard publisher.

Wu, Mih-chir (吳密察) (1994 b). The formation of Taiwan history study and its discourse (臺灣史的成立及其課題). *Contemporary (當代)*. August 1994, (100), 78-97.

Wu, Mih-chir (吳密察) (1996). The establishment of the Republic of Taiwan in 1895 (1895 年臺灣民主國的成立經過 ). In Chang, Shiahn-yarn, Lee, Hsiao-feng, & Dai, Baau-tsun (張憲炎, 李筱峰, 戴寶村) (Eds.), A collection of selected essays on Taiwan history, Vol. 1 (臺灣史論文精選 Vol. 1) (pp. 11-54). Taipei: Jade mountain publisher.

Wu, Mih-chir (吳密察) (1997). History education and the teaching of local culture and history (歷史教育與鄉土史教育). *Contemporary (當代)*, August 1997, (120), 32-37.

Wu, Nai-teh (吳乃德) (1992 a). Party support and national identities: Social

cleavages and party competition in Taiwan (國家認同與政黨支持臺灣政黨競爭的社會基礎). Bulletin of the Institute of Ethnology Academia Sinica 74, 33-61.

Wu, Nai-teh (吳乃德) (1992 b). Provincialism, political supports, and national identity (省籍意識, 政治支持, 和國家認同). In Chang, Mau-kuei (張茂桂) (Ed.), Relationships among ethnic groups and national identity (族群關係與國家認同) (pp. 27-51). Taipei: Yeh-chiaang publisher.

Wu, Yuan-chieh (吳元杰) (Ed.) (1961). Teaching methods for elementary school social studies (小學社會科教學法). Taipei: National Educational Materials Office.

Yang, Tsung-rung (楊聰榮) (1992). Cultural construction and national identity: A case of post-war Taiwan (文化建構與國民認同: 戰後臺灣的中國化). Unpublished master's thesis, Ching-huar university, Taiwan.

Yin, Jang-yi (尹章義) (1994). The formation and development of "Taiwanese consciousness." ("臺灣意識"的形成與發展). In Institute of Modern History, Academia Sinica (中央研究院近代史研究所) (Ed.), Identities and the establishment of state: Chinese and western experiences in the modern world (認同與國家: 近代中西歷史的比較) (pp. 363-390). Taipei: Academia Sinica, the Republic of China.

Young, Yi-rong (羊憶蓉) (1994). Education and national development: Taiwan's experience (教育與國家發展). Taipei: Kuei-guan publisher.

Yuu Jih (宇驥) (1970). An analysis on *Pin-po* tribes: Its patterns of farming and formation of communities (從生產形態與聚落景觀看臺灣史上的平埔族). Taiwan's Historiographical Records (臺灣文獻), 1970, 21 (1), 1-18.





MICHIGAN STATE UNIV LIBRARIES



31293018128672