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College of Social Sciences

National Chengchi University

碩士論文

Master's Thesis

**Transformation of Taiwan Language Structure  
under Martial Law in terms of Economic Activities**

研究生：蘇豐文 Student: Su, Feng-wen

指導老師：卜道教授 Advisor: Dr. David Blundell

中華民國九十九年六月

June 2010

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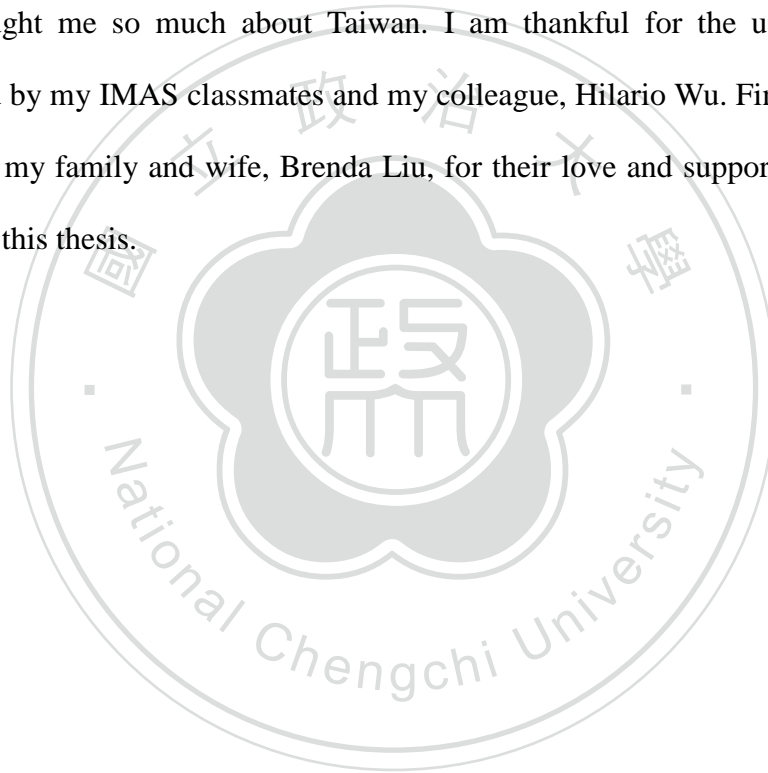
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## ABSTRACT

The main purpose of this thesis is to find out the economic factors that contributed to the successful promotion of Mandarin during martial law period, and serve as a reference for future language planning. Taiwan used to be ruled by Dutch, Koxinga, Qing dynasty, Japan, and the Republic of China (ROC) government. Thus, Taiwanese society gradually becomes multiethnic, multicultural, and, to my greatest concern, multilingual. Each ruling power had tried to impose different degrees of language policies on Taiwan, particularly Japan and the ROC government that were eager to establish an official language. Eventually, the successful popularization of Mandarin is overwhelming.

A number of theories and materials regarding the relationship between language and economy have been reviewed. First of all, it is argued that language could be objectified and valued. Thus, different language varieties contain different values. Second, according to rational choice theory, people make choices that would maximize their benefits. The implication is that people choose to learn a certain language variety that benefits them most. Third, as an economy becomes more and more advanced, linguistic diversity might be reduced.

The ethnolinguistic groups, language varieties, and language history of Taiwan are also discussed. There are four major ethnolinguistic groups in Taiwan: Hoklo, Hakka, aboriginal people, and Chinese Mainlanders. As for language varieties, Hoklo, Hakka, Mandarin, Taiwan Guoyu, and aboriginal languages are separately dealt with. The language history of Taiwan is divided into the evolution of spoken and written language of Taiwan.

Then, the economic value of each language varieties in Taiwan during martial law period is assessed. The result is that Mandarin possessed the highest economic

value. Besides, some features of economic development, such as structural change, the emergence of social classes, the desire to gain upward social mobility, expansion in education, and examination systems that favored Mandarin, also facilitated the spread of Mandarin. And through a comparison between the Japan-led and ROC-led island-wide language directives, this thesis argues that political factors alone could not sufficiently explain the successful promotion of an official language. Economic factors must be taken into account as well.

Finally, some suggestions are proposed for the maintenance and revitalization of Hoklo, Hakka, and aboriginal languages.



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# CHAPTER ONE

## INTRODUCTION

### 1.1 Research Motivation

Language issues are multifaceted. It involves ethnic, cultural, political, and religious ideologies. John Packer (2002) said that language is the nature of the human species, and it is not only an important instrument for communication but also the carrier of identity, both of the individual and of group. Consequently, changes in language structure imply the rise or decline of a certain power.

Throughout the history of Taiwan, the frequent transitions of ruling regimes have brought about multilingual phenomena. Taiwan has a legacy of rule by Dutch,<sup>1</sup> Koxinga,<sup>2</sup> Qing dynasty, Japan, and currently the Republic of China (ROC). Each ruling power, more or less, had impacted the language structure to a certain degree. Among them, the Japanese and ROC occupation had the most lasting influence. During these two periods, the foundation of economy and infrastructure was consolidated; in the meantime, both of them tried to eradicate the Taiwanese identity by way of assimilation policies, including various successful language policies. As far as languages of Taiwan are concerned, these two periods are a catastrophe.

Island-wide language directives led by the Japanese and ROC governments were both successful. If Japan had not been defeated in World War II, Taiwan would still have been ruled by Japan as a possible Japanese monolingual island. After the ROC authorities took over Taiwan, monolingual directives were given as the Japanese had done. The mother tongues of the island's peoples were so strictly suppressed that the younger generations nowadays mostly communicate in the ROC directive language - Mandarin, especially for the higher educated.

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<sup>1</sup> The Dutch occupied Taiwan in 1624 to 1662.

<sup>2</sup> Koxinga, a remnant force leader of Ming dynasty, defeated the Dutch and seized control of Taiwan.

The language structure of Taiwan has undergone a tremendous transformation. During Japanese colonial period (1895-1945), Hoklo and Japanese were the two most important island-wide languages. ROC rule of Taiwan from 1945 enforced Mandarin to become the dominant language all of a sudden.

A number of studies have been conducted to elaborate this drastic change mostly from political perspectives. However, political explanations alone can not sufficiently provide a holistic answer. As a result, my thesis intends to explain this phenomenon from an economic perspective so that related research could be more complete and comprehensive.

Do all the languages in the world contain the same value? The answer is negative. About 96% of the world's languages are spoken by about 3% of the world's population; by contrast, about 97% of the people in the world speak about 4% of the world's languages.<sup>3</sup> Obviously, some languages have lost their competitiveness, and thus are endangered. The languages in Taiwan have experienced this loss.

The value and development of languages are intertwined with economic development. A growing literature argues that commonality of language is associated with better economic performance. Views on economic growth are negatively correlated with linguistic heterogeneity across developing countries. Manufacturing employment growth discourages linguistic heterogeneity. My opinion is that language learning and linguistic diversity ought to be taken as endogenous to the process of economic development. In other words, as a country becomes more advanced and industrialized, the number of languages in the country shall decline or a certain language might become more and more influential and dominant. Therefore, I am motivated to find out whether the transformation of language structure is intertwined

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<sup>3</sup> Bernard, H. Russell. 1996. Language Preservation and Publishing. In Nancy H. Hornberger (ed.): *Indigenous Literacies in the Americas: Language Planning from the Bottom Up*. Berlin: Mouton de Gruyter, p. 142.

with the process of economic development.

## **1.2 Purpose of the Thesis**

This thesis aims to present an extended and systematic study on the changes in language structure from an economic perspective. Thus, the purpose is to achieve the following goals.

1. To provide an economic explanation on language development, and contribute to the integrity of related studies.
2. To understand why the availability of a certain language becomes an economic advantage.
3. To evaluate the economic value of the languages in Taiwan, and analyze how it affects the language structure.
4. To understand the impact of economic development on the transition of language structure.
5. To understand how the unequal distribution of languages affects economic inequality.
6. To elaborate the similarities and differences in the two island-wide language directives during Japanese and martial law periods respectively, and analyze the political and economic factors that led to the outcomes.
7. To serve as a reference for future language planning in Taiwan.

## **1.3 Significance of the Thesis**

Most of the recent studies on language issues in Taiwan are mostly connected with mother tongue education, English instruction, language politics and rights, language planning and revitalization. Not many studies are related to economic and language development.

Since we now live in a highly globalized and mercantile world, economic forces behind languages play an influential role in determining language choice of the common people and thus the success of all language policies. For example, according to research conducted by Language Training and Testing Center (LTTC)<sup>4</sup> in 2005, those in higher positions in banking professions in Taiwan are found to be more proficient in English, and therefore that ability is of great significance in relation to career development. A large number of relevant studies with similar conclusions could be easily found. As a result, people in Taiwan are in pursuit of fluent English abilities in an effort to increase competitiveness. And related English education policies hardly encounter any obstacles. In a word, economic forces mainly drive current English-learning trends. Without economic support, English would not have prevailed and acquired such a powerful status.

The same pattern also applies to other language situations across time and space. As a consequence, to fully understand the changes in language structure of Taiwan, we must not only focus on political factors, but economic forces as well.

To sum up, this study provides another perspective to analyze the language structure of Taiwan. Furthermore, with better understanding of economic factors behind languages, future language planning could be based on related researches since people in modern times are becoming more and more utilitarian.

#### **1.4 Definitions of Terms**

Language planning: Cooper (1989) states that language planning refers to deliberate efforts to influence the behavior of others with respect to the acquisition, structure, or functional allocation of their language codes. These efforts may involve graphization, standardization,

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<sup>4</sup> LTTC is located in Taipei, Taiwan.



modernization, and allocation of status or functions to particular language varieties (Tollefson, 1991). According to Reagan (2005), language planning has been divided into four types: status planning, corpus planning, acquisition planning, and attitude planning.

**Language policy:** It is sometimes synonymous with language planning. Corson (1990: 141) explains that language policy identifies the nation's language needs across the range of communities and cultural groups that it contains; it surveys and examines the resources available; it identifies the role of language in general and individual languages in particular in the life of the nation; it establishes strategies for managing and developing language resources as it relates all of these to the best interests of the nation through the operation of some suitable planning agency.

**Language variety:** Language variety is often called dialect instead of language. However, to avoid political or ideological implications with regard to which language is referred to as a "dialect," some sociolinguists prefer the neutral term language variety to dialect. The term language variety does not imply a particular status nor does it reflect the social status of its speakers. The operational definition of language variety in this thesis is any mode of language use perceived or identified as distinct by the speech community, regardless of the extent of its relationship with other language forms. Thus, a language variety can be anything from a local accent to a separate language (Karl-Eugen, 1994).

**Language attitude:** Language attitude is a predisposition to respond evaluatively to

perceptual or linguistic signs. It can be considered to measure social convention and the prestige of certain language varieties in speech communities. It also reflects an awareness of the status and prestige accorded to the speakers of the varieties (Karl-Eugen, 1994).

Language shift: A concise definition of language shift is given by Fasold (1984).

It simply means that a community gives up a language completely in favor of another one. His definition implies that language shift is the long-term result of a community's language choice. Language shift may ultimately lead to language death.

Mother tongue: Mother tongue has no standardized definition. It could mean the language one acquires from birth, the language one identifies with the native speaker, or the language one knows best or uses most. All in all, mother tongue provides a basis for sociolinguistic identity. There are, as proposed by Tulasiewicz and Adams (1998), three distinctive uses for mother tongue. Firstly, it is a language spoken in private settings; secondly, it is used as a regional language; thirdly, it is a language with national status and used in public occasions.

National language: According to Holmes (1992), national language is a political, cultural, and social unit. It contains a symbolic function that not only represents the national unity, but also identifies the nation and unites the people of the nation. It has an ideological and emotional dimension that binds people together, and thus stands for the identity of a country, state, or territory. National language and official language are two separate concepts although they

might coincide in some aspects.

**Official language:** According to Holmes (1992), the functions of an official language are primarily based on utilitarian considerations instead of symbolic considerations. Mesthrie, Swann, Deumert, and Leap (2000) argue that an official language is designated as a legally appropriate language for political and cultural purposes. Usually, official languages are those with special legal status in a particular country, and are used in official settings such as court and parliament. To be an official language, it does not matter whether the language is widely spoken or not. For example, Maori language possesses official status, but it is spoken by less than five percent of the New Zealand population; in the United States, English is undoubtedly dominant, but it is not the official language.

**Lingua franca:** *Lingua Franca* is a functionally defined language employed over an extensive area by people speaking mutually unintelligible languages for communicative purposes. Holmes (1992) adds that the most useful and widely adopted lingua franca, in certain cases, is the country's official language or national language. For example, E Chen-chun mentions (2003) that about one hundred vernaculars were spoken in the former Soviet Union, and Russian was adopted as the lingua franca, at the same time being the country's official language and national language; furthermore, there are more than one hundred languages spoken in the Philippines, and Filipino is not only the lingua franca but also the official and national language of the Philippines.

## 1.5 Research Scope

The time frame of this thesis mainly focuses on martial law period, which is from 1949 to 1987. However, in order to gain a holistic understanding of Taiwan, some sections might extend into the Dutch era or even earlier and to present times as well. Martial law period was perhaps the darkest era for ordinary people from political, cultural, social, and linguistic perspectives; however, it was during this period that the economy of Taiwan started to take off. On the one hand, the people in Taiwan were severely suppressed in virtually every aspect of life, and in the meantime, with the support of the authoritarian government, Mandarin started to invade the society and occupy the dominant status; on the other hand, with the strong involvement of the state, the economic structure of Taiwan successfully transformed from labor intensive to capital intensive, and to nowadays technology intensive, making it possible to feed and enrich millions of people in Taiwan. Hence, martial law period was a time of contradictions that deserve more researches from diverse angles.

The primary research target of this study is the transformation of language structure. Taiwan is an immigrant society that is composed of various languages, cultures, and ethnic groups. Colonial languages aside, during martial period there were three main categories of language varieties, namely Hoklo, Hakka, and aboriginal languages. Nonetheless, with the advent of colonial languages such as Mandarin and Japanese, the language structure was unfortunately disintegrated and reshuffled. To date, the Japanese language still carries a profound influence in Taiwan's social, cultural, and commercial activities, not to mention Mandarin that has already on top of the language hierarchy.

The economic development of Taiwan also plays an important role since this thesis tries to find out how the economic aspect is related to the changes in language structure. After World War II and decades of Japanese occupation, the economic

foundation of Taiwan suffered severe damage. But after a series of construction and recovery efforts, Taiwan had amazed the world with its economic miracle. This economic success by all means had had diverse impacts on the society and the transformation of language structure.

## **1.6 Research Method**

This thesis intends to find out the economic reasons that account for the transformation of language structure during martial law period. Since the timeframe focuses on the past event, historical and documentary research methods are adopted to collect necessary materials. Furthermore, in chapter five, the Japan-led and ROC-led island-wide language directives are compared to explore the underlying economic factors that explain why ROC-led island-wide language directives were more effective. As a result, comparative research method is also adopted.

### **1.6.1 Historical Research**

Historical research is the systematic analysis of related documentation or information in an effort to find out accurate description and explanation of a phenomenon. It is a reflective process that discovers rather than generates data. In the past, it focused on the discovery and criticism of historical materials; recently, it puts emphasis on explaining the cause and effect of an event.

This thesis adopts primary and secondary source materials to understand the cause and effect of the changes in language structure. Furthermore, I expect that the analytical process and result could be regarded as a means to elaborate current situation.

### **1.6.2 Documentary Research**

Documentary research refers to the analysis of texts and documents as source materials, such as government publications, official statistics, academic papers, etc. Analysis of texts and documents means to structurally and systematically use written materials created by an authoritative source to explore research questions. The materials needed by my thesis primarily are from publishing companies and libraries in the ROC at Academia Sinica, Ministry of Economic Affairs, Ministry of Education, Council of Indigenous Peoples, and Council for Hakka Affairs. Research studies include masters and doctoral theses, journal articles, conference papers, and government research reports, and so on.

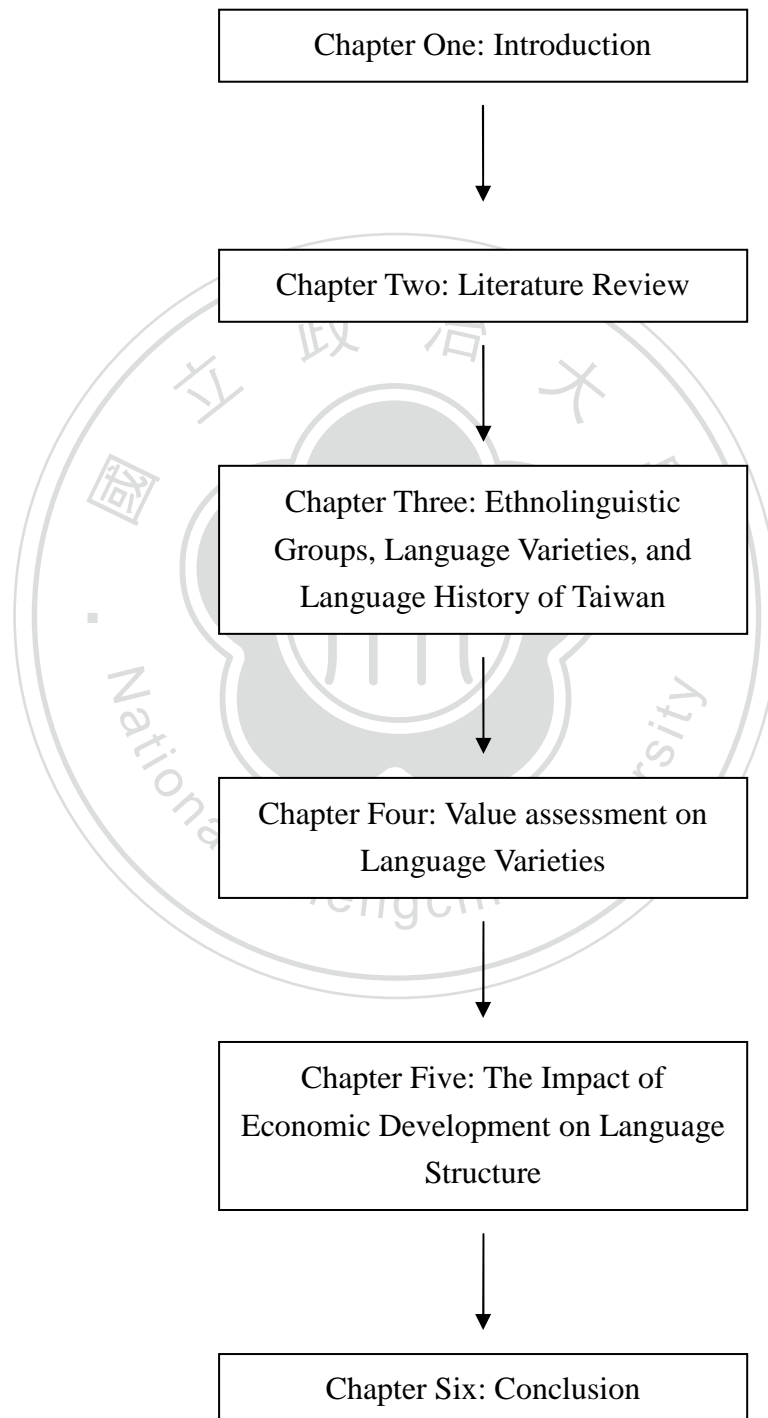
### **1.6.3 Comparative Research**

Comparative research aims to discover some hidden information of the subjects being compared. In chapter five of this thesis, I am going to compare the two island-wide language directives during Japanese colonial period and martial law period respectively. A number of studies suggest that political factors were what bring about the transformations in language structure; however, through comparative analysis, this thesis find out that economic forces were also influential. Relevant economic, political, historical, linguistic, educational, and societal materials will be widely collected and compared with a view to understanding the similarities and differences of the two island-wide language directives.

## 1.7 Organization of the Thesis

Figure 1-1 shows the development of chapters of this thesis.

**Figure 1-1: Development of Chapters**



Based on Figure 1-1, the descriptions of the chapters are as follows.

Chapter One elaborates the research motivation and purpose, significance of the thesis, definitions of terms, research scope and method, and organization as well as limitations of the thesis.

Chapter Two introduces important literature, theories, and related studies in order to critically analyze the transformation in language structure during martial law period from economic perspective.

In Chapter Three, ethnolinguistic groups, language varieties, and language history of Taiwan are presented. The discussion on ethnolinguistic groups is divided into four subsections that deal with groups popularly known as aboriginal people, Hoklo, Hakka and the Chinese Mainlanders. As for language varieties, this thesis deals with the origin, development, and distribution of five major language varieties, which are Hoklo, Hakka, Mandarin, Taiwan Guoyu (台灣國語), and aboriginal languages.

Chapter Four analyzes economic values of each language variety in Taiwan. Ostensibly, all languages are supposed to be equally important; however, the truth is just the opposite. With strong external intervention and influence, each language variety has been given with different degrees of economic values so that the government or people naturally cling to the economically powerful language as a medium for communication. Thus, the alteration in language structure occurs. This chapter expounds this phenomenon that happened in Taiwan during martial law period.

Chapter Five is further divided into two parts. The first part of chapter five clarifies the impact of economic development on language structure. The economic values of languages are intertwined with actual market forces and economic development. To reduce costs, a standardized production procedure is indispensable.



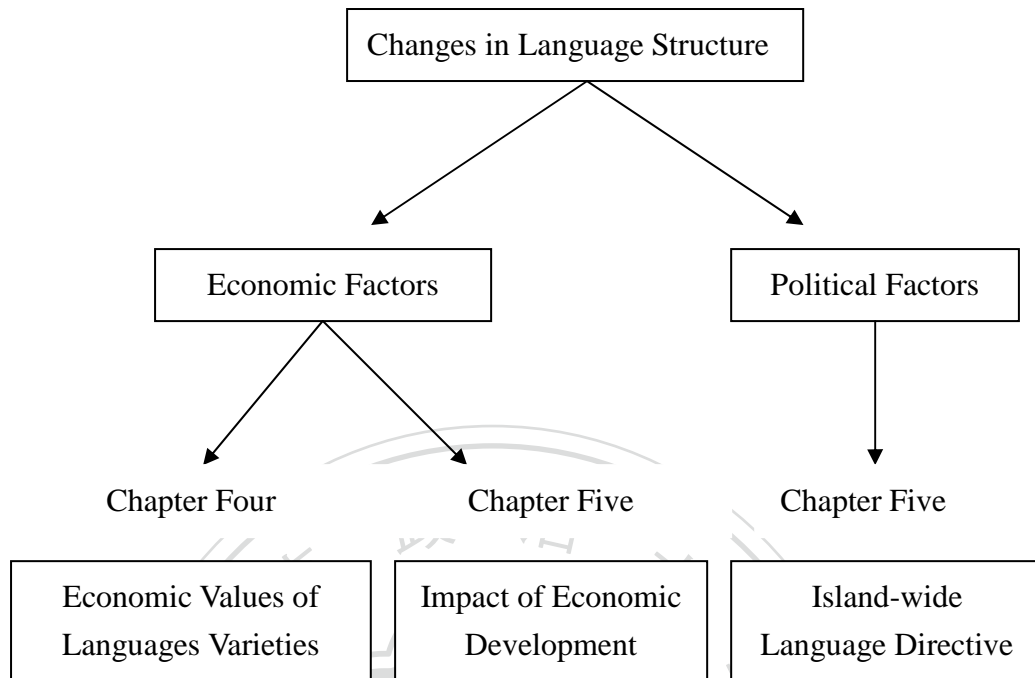
In this regard, the cost of an economy with more communication tools, including languages, would be much higher. Therefore, when a country becomes more advanced, the economic forces might intervene with the language structure and jeopardize the existence of those language varieties with lower economic value.

In the second part of chapter five, the two island-wide language directives that happened in Japanese and martial law periods respectively are compared. The promotion of Japanese did not really penetrate the society. The common people found it unnecessary to speak Japanese in private occasions. On the contrary, the promotion of Mandarin was so successful that it became the lingua franca both in public and private domains. In addition to political involvement, this chapter explains that economic factors are also responsible for the distinct outcomes of the two island-wide language directives.

Chapter Six systematically concludes the findings of previous chapters and some suggestions are proposed for future language planning.

Chapter four and five are the main analytic chapters of this thesis. Their relationship is displayed in Figure 1-2.

**Figure 1-2: Relationship of Chapters Four and Five**



## **1.8 Limitations of the Thesis**

There are two major limitations concerning this thesis. One is related to research scope, and the other to research method.

### **1.8.1 Limitation on Research Scope**

The principal time frame is the martial period; however, some parts might cover from Dutch era and to present times. To collect materials related to such a long period of time would be difficult. In addition, included in this thesis is the overall language structure, which consists of a variety of languages with sophisticated and multifaceted characteristics; as a result, it would be no easy task to analyze each language variety but study them as a whole. Although the author has put a lot of time and efforts in doing research and analysis, it still requires more attention, dedication, and time to make this study closer more refined.

### **1.8.2 Limitation on Research Methods**

Generally speaking, research method can be roughly divided into empirical and non-empirical research. Empirical research assumes that scientific procedures can be directly applied to the study of social and behavioral science; thus, methods that correspond to scientific principles such as questionnaires, tests, or surveys are usually adopted. Non-empirical research focuses on logical deduction that discovers truthfulness. In a nutshell, empirical research tries to find out practical knowledge while non-empirical research pursues inference of logics.

The research methods adopted in this thesis are all non-empirical so that there is no analysis and operation on directly executed statistics but only citation of existing surveys with inference, and there might be no empirical procedures but the researcher's non-empirical deduction. This study relies heavily on the collections of written materials such as conference papers or government publications, which may be biased, incomplete, etc. Future researches on related fields could adopt some empirical research methods to make it more persuasive and sound. This is the aspect that needs improvement.

Furthermore, the collecting process of necessary materials might be affected by the researcher's subjective judgment so that the real outcome of this study would perhaps be distorted. And the existing materials are usually of secondary sources; consequently, the examination on the reliability and validity of the materials poses a great challenge.

## CHAPTER TWO

### LITERATURE REVIEW

#### 2.1 Rational Choice Theory

The applications of rational choice theory can be found in various disciplines of social sciences such as economics, sociology, criminology, history, psychology, philosophy, and anthropology. Downs (1957) defines rational choice as proceeding towards goals with a minimal use of scarce resources and undertaking only those actions for which marginal return exceeds marginal cost.<sup>5</sup>

Rational choice theory in a general sense helps us understand individual behaviors that are deemed to be seeking the best benefits. Jon Elster (1986) said that rational choice theory tells us what we ought to do in order to achieve our aims as well as possible.<sup>6</sup> Rational choice theory provides a framework for understanding social and economic behaviors. It assumes that human behaviors are guided by instrumental reasons.

Stephen (2004: 87-107) argued that rational choice theory is not one theory but a descriptive term for the description of any individual theories that apply a rational choice approach. This approach assumes that rational choice is formulated with a view to achieving the most preferred outcome. Moreover, the behaviors or actions taken by the individuals are conditioned by social, cultural, or psychological limitations.<sup>7</sup>

Under the principles of rational choice theory, individuals are assumed to be motivated by their desires or goals. However, they do not make judgments without

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<sup>5</sup> Downs, Anthony. 1957. An Economic Theory of Political Action in a Democracy. *The Journal Political Economy*, 65(2): 135-150.

<sup>6</sup> Elster, Jon. 1986. *Rational Choice*. New York: New York University Press, p. 1.

<sup>7</sup> Quackenbush, Stephen L. 2004. The Rationality of Rational Choice Theory. *International Interactions*, 30(2): 87-107.

external interferences. That is, people act under specific constraints and on the basis of the information that they are able to collect about the circumstances under which they are acting.

When faced with a set of choices, people tend to make assessments according to personal rationality. That is, based on personal preferences and resources at hand, people make choices that best suit their subjective needs. As suggested by Camerer and Fehr (2006), individuals are assumed to choose those actions that best satisfy their preferences.<sup>8</sup> As a result, rational choice is a balanced decision between aims and means. To sum up, individuals make decisions or take actions that would maximize the benefits and minimize the costs.

Consequently, it is always worth knowing that whether a specific action taken by an individual or institution is rational or not. In other words, it would be unwise to think of actions taken by others as irrational when we just disagree with them. Rational choice theory suggests that we should look for reasons behind such differences and disagreements. Although there might be some other theories that also account for relevant phenomena, rational choice theory still deserves attention since all human social behaviors contain, more or less, rational elements.

Jon Elster (1986) further proposed that rational choice theory contains three elements in the choice situation. The first element refers to a feasible set of actions that are believed rationally to satisfy various constraints; another refers to the casual structure of the situation, which determines the outcomes of a certain course of action; the other is a subjective ranking of the feasible alternatives that come from a ranking of the outcomes to which they lead.<sup>9</sup> Thus, to take rational actions could be simplified as choosing the highest-ranked action in the feasible set.

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<sup>8</sup> Camerer, C. and E. Fehr. 2006. When Does 'Economic Man' Dominate Social Behavior? *Science*, 311: 7-52.

<sup>9</sup> Elster, Jon. 1986. *Rational Choice*. New York: New York University Press, p. 4.

If we apply Jon Elster's notion of rational choice theory to the language situation of Taiwan after taking the island from Japan by the ROC and United States (US) allied forces, we would first come out with sets of languages in the population that were Mandarin, Hoklo, Hakka, aboriginal languages, and Japanese. It was the unique political and economic structure that brought Mandarin to the top of the linguistic hierarchy, and thus people at that time naturally or forcibly chose Mandarin as major communicative tool based on their rationality. As a result, the spread of Mandarin became inevitable while the other language varieties were highly devaluated.

## 2.2 Value System of Jean Baudrillard

In his first two books, Baudrillard was against the interpretation of consumer society as a linguistic system; nevertheless, he applied Saussure's semiological theory of language to his analysis of the system of commodities in his later work *For a Critique of the Political Economy of the Sign*. Thus, Baudrillard started interpreting all aspects of social life as a system of signs.<sup>10</sup>

To supplement Marxist analysis of commodities in terms of use value and exchange value, Baudrillard proposed that there are four ways of an object obtaining value. They are: 1. a functional logic of use value; 2. an economic logic of exchange value; 3. a logic of symbolic exchange; 4. a logic of sign value. Baudrillard believed that the analysis of sign values uncovers the ways in which the dominant class instills its tastes, values, and privileges so as to achieve class domination.<sup>11</sup>

The term use can be best described as the handling of objects or, in this case, of languages, although all languages are quite similar from this perspective. For example,

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<sup>10</sup> Kellner, Douglas. 1989. *Jean Baudrillard: From Marxism to Postmodernism and Beyond*. Stanford: Stanford University Press, p. 21.

<sup>11</sup> Baudrillard, Jean. 1981. *For a Critique of the Political Economy of the Sign*. St. Louis, MO: Telos Press, p.115.

a car runs. The functional logic of use value of a language variety refers to its instrumental purpose. There are a number of factors that influence the use value of a certain language variety such as its communicative usefulness, easiness of acquisition, scarcity and so on. Besides, use value may vary from one social context to another and from one ethnolinguistic group to another. Thus, to propose a general conclusion on the use value of languages, the more a language is used, the higher use value it generates.<sup>12</sup>

Exchange value of an object refers to its economic value. For instance, a car might be worth the salary earned by two years of hard work. Languages also contain exchange value. The evaluation of such value is based on what motivates people to learn or to use a certain language in an effort to achieve their objectives such as employment or enjoyment. Generally speaking, the number of speakers of a certain language plays a very important role in determining its exchange value; nevertheless, it is not the conclusive factor. Sometimes, the political and economic powers behind different linguistic groups are far more detrimental. For instance, although nowadays there are not many English speakers in Taiwan, English still possesses very high exchange value due to its strong economic powers, and people in Taiwan are eager to learn English for the potential benefits that it brings. The exchange value of languages is based on a variety of determinants that should be analyzed as a whole.

Symbolic value involves the subjective projection of an affective nature onto an object. For example, we might attribute a value to a certain object as a symbol of belonging, identity, amity, or animosity. And it is quite easy to associate symbolic value with languages. Mother tongues in the colonized countries always play the role that binds people together. Nationalism, in this case, is a symbol projected by

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<sup>12</sup> It could mean the actual number of speakers or the frequency of using that language in a multilingual society.

languages. Besides, it is quite common that when people study abroad, they tend to get together with their compatriots so that they could communicate in the same language, which symbolizes a sense of belonging, security, and familiarity. Furthermore, there is no strong correlation between the vitality of a language and its symbolic value. On particular occasions, high symbolic value could be attributed to the dead or endangered languages which still enjoy a special position among powerful languages.

The sign value of an object refers to the evaluations that are made according to its social prestige. Social prestige refers to the attitudes held towards the target object and the socioeconomic powers that it implies. For instance, a luxurious car not only contains use value (a car runs) and exchange value (a car might be worth a five-year salary), but also has high sign value since the society usually holds a set of special stereotypes towards particular car brands. When applying the notion of sign value to the analysis of language phenomena, numerous examples could offer an explanation. The proliferation of English, Spanish or Portuguese in the once colonized countries represents the success of physical powerfulness, economic control and political manipulation. Pure linguistic factors only play a very minor role. The developments of those powerful colonizer languages might entail a variety of benefits, and thus high value, for their speakers.

## **2.3 Language and Economy**

Economics is the social science that studies how scarcity and incentive influence or reconcile our choices. Scarcity refers to the condition when available resources are insufficient to satisfy wants; incentive refers to a reward or a penalty that encourages



or discourages an action.<sup>13</sup>

In a multilingual society, scarcity might happen frequently since an individual's mother tongue is not sufficient to satisfy the communicative needs. Especially under an authoritarian government, only the designated official language is able to satisfy the communicative, political, and economic needs in public spheres. Thus, incentives that encourage people to learn the designated official language arise. The transformation of Taiwan language structure under martial law was an example that explains this situation.

The world can not function as usual without language. Language is an important cultural asset that facilitates the exchanges of both physical and non-physical interactions. It is the medium of business; nevertheless, it sometimes could act as a barrier to trade. There is such a powerful and tight relation that it will not make perfect sense to explain the changeable linguistic map of the world without referring to economic development.

The above statement draws attention to the study of language economics, which tries to figure out how linguistic and economic variables influence one another. For instance, it has been argued that in most African countries, one has to gain knowledge of a former colonial language in order to achieve upward social mobility and better economic opportunities. From the perspective of language economics, linguistic products such as language varieties and accents are regarded as goods or commodities that contain a value based on the functions of markets. Some linguistic products may be in possession of higher market values when compared with others; thus, people tend to invest in the acquisition of a certain linguistic product to enjoy the underlying advantages. Furthermore, language planning efforts are most likely to succeed when

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<sup>13</sup> Bade, Robin and Michael Parkin. 2004. *Essential Foundations of Economics*. Boston: Pearson Addison Wesley, pp. 2-3.

supported by economic or associated social incentives for the minority groups (Kamwangamalu, 2008).

Alsagoff (2008) applied the concept of commodification, which requires the theory of political economics, to the analysis of languages. This concept regards languages as goods that can be objectified, evaluated, and exchanged for on the market. In other words, the value of a language depends on its correlation with some form of benefit or goods of worth to the society. For instance, economic value can be given to a particular language as long as it, directly or indirectly, generates advantages to its speakers or smoothes the economic functioning of a society.

The notion of global language system, proposed by de Swaan, is a sociological classification of languages based on the non-haphazard connections between various language communities. Languages are classified into four categories, namely central languages, supercentral languages, hypercentral languages, and peripheral languages. The speakers of peripheral languages, for the purpose of communication, tend to acquire the same second language, which becomes central language to their region. This inclination of language shift towards central language can be explained through concepts of economics. According to de Swaan, languages are hypercollective goods that require an investment to learn. Languages are like social networks that provide connections into that specific language community. Thus, the acquisition of a (central) language is like an investment that brings potential economic opportunities.<sup>14</sup>

Language ability has been proven to be a detrimental form of human capital, and it is especially true in developing countries. If we assume that the acquisition of language can be achieved through individual choice and parents can decide which of the existing languages to pass on to their children, it would be quite possible that the selection of which language to acquire or to pass on might be determined by the

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<sup>14</sup> Spolsky, Bernard. 2004. *Language Policy*. Cambridge: Cambridge University Press, pp. 88-89.

potential economic incentives that the target language could bring. The economists that study immigrant labors have argued that ability in the receiving countries' language earns returns in the labor market (Bleakley and Chin, 2004; Chiswick and Miller, 1995).<sup>15</sup> Lankshear (1997) suggests that language has been economized in the sense that they are promoted, from individual to national level, for reasons of economic advantage. As a consequence, language is likely to be an integrated characteristic of economic development.

Members of non-prestige social groups or linguistic minorities seem acutely aware of the fact that certain languages (non-prestige or minority languages) do not have a function in gaining upward social mobility. Spanish in America, French in Canada, Moroccan-Arabic in Morocco, or Quechua in Peru therefore are not highly associated with academic schooling, economic success, etc. (Rene Appel and Pieter Muysken, 1987: 20)

Pool (1972: 222) once made a short statement that linguistically highly fragmented countries are economically poor. As in many developing countries, linguistic fragmentation coincides with low economic growth. However, this does not mean that linguistically highly homogenous countries are economically rich, for which it is not difficult to find examples.<sup>16</sup> Practically speaking, Li Wei (2000) suggested that difficulties in communication within a country can act as an impediment to commerce and industry. It is assumed that multilingual countries are often faced with certain problems that monolingual states do not encounter although pure monolingual states can be hardly found. When the highly industrialized countries colonized the underdeveloped countries during the eighteenth and nineteenth

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<sup>15</sup> Although the conclusion is based on the analysis of immigrant society, the struggle of the people in the lower class in any societies is somewhat similar; thus, the generalization of the conclusion is credible.

<sup>16</sup> Pool, Jonathan. 1972. National Development and Language Diversity. In Fishman, J.A. (ed.). *Advances in the Sociology of Language*, 2. Den Haag: Mouton, pp. 213-230.

centuries, one of the measures taken to tear down the obstacles in reaping economic surplus was to diminish communicative difficulties by way of various language policies that promoted the colonizers' languages.<sup>17</sup>

Coulmas (1992: 25) suggested that a high level of socioeconomic development is not compatible with linguistic fragmentation. This perspective is in accordance with that of the language planners in the developed and industrialized countries, which shows a certain degree of monolingualism. Though in some advanced countries, several languages co-exist and enjoy official status, the governments tend to promote one certain language (or a few already widespread languages) and make it dominant, while downplaying the others to symbolic and cultural accessories rather than functional significance.<sup>18</sup>

Pattanayak (1996) brought up the idea that the co-existence of multiple languages is perceived to be a threat to national cohesion, administrative integration and barriers to economic growth. Furthermore, the significant influence of urbanization on languages was also emphasized by him. Simply speaking, in highly industrialized and urbanized societies, the language of the rich becomes richer and the language of the poor becomes poorer.<sup>19</sup>

The notion of linguistic instrumentalism was emphasized by Lionel wee (2008), who defined it as what justifies the existence of a language in a community based on its usefulness in achieving specific utilitarian objectives such as access to economic development or social mobility.<sup>20</sup> Although it has been widely agreed that language possesses certain sentimental attachments that bring people together, the survival of an endangered language, according to linguistic instrumentalism, might rely more on

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<sup>17</sup> Wei, Li (ed.). 2000. *The Bilingualism Reader*. London: Routledge, pp. 3-25.

<sup>18</sup> Coulmas, Florian. 1992. *Language and Economy*. Cambridge, MA: Blackwell Publishers, p. 25

<sup>19</sup> Coleman, Hywel and Lynne Cameron (ed.). 1996. *Change and Language*. British Association for Applied Linguistics: Multilingual Matters Ltd, pp. 143-152.

<sup>20</sup> Tan, Peter. K. W. and Rani Rubdy (ed.). 2008. *Language as Commodity*. New York: Continuum International Publishing Group, p 32.

its correlation with social mobility or potential economic advantage that comes with it.

To sum up, there is no scientific evidence to show that multilingual countries are particularly disadvantaged compared to monolingual ones; nevertheless, it might be true that linguistic uniformity and economy reinforce each other. In other words, economic advancement leads to the reduction of linguistic diversity.<sup>21</sup>

## 2.4 Forms of Capital

Sarah Thornton (1995) once made a statement that what unifies Bourdieu's forms of capital is that they are all to be found in his own social world where the participants have a high amount of "institutionalized cultural capital."

Bourdieu (1984) proposed that there are three forms of critical resources, metaphorically described as 'capital'. They are economic, social, and cultural capitals. Economic capital refers to command over flows of economic resources such as cash and other forms of material wealth.

Social capital, according to Putnam (1993), consists of social networks and associated norms that have an effect on the productivity of the community. Besides, Putnam also suggested that social capital has transformed from an individual possession into a collective attribute, which facilitates cooperation and mutual support within the community. Bourdieu (1986) defines social capital as "the aggregate of the actual or potential resources which are linked to possession of a durable network of more or less institutionalized relationships of mutual acquaintance and recognition." Social capital, argued Grootaert (2001), also makes the other types of capital and their productive combination more efficient. Generally speaking, it refers to resources generated from connections within and between social networks that, if properly dealt

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<sup>21</sup> Wei, Li (ed.). 2000. *The Bilingualism Reader*. London: Routledge, pp. 12-13.

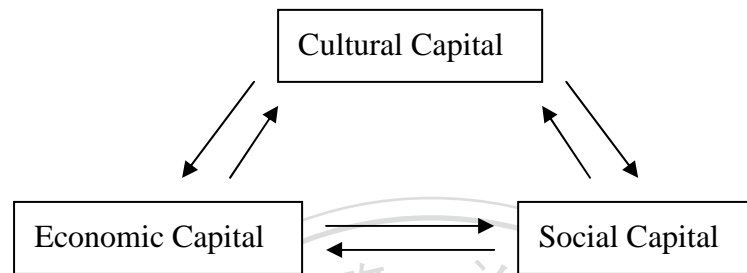
with, provide individuals with advantages in pursuit of profits.

Cultural capital is associated with Bourdieu, for whom it acts as a social relation within a system of exchange that includes the accumulated cultural knowledge that confers power and status (Phillipson *et al*, 2004). To further explain the educational achievements of children from different socioeconomic backgrounds, Bourdieu proposed the idea of cultural capital, which, broadly defined, refers to the intangible assets such as knowledge, skills, and education that a person has. Instead of regarding culture only as shared norms and values in a society, Bourdieu argued that it contains the properties of economic capital and is capable of generating profits. Cultural capital should be interpreted as a particular form of capital, not just a metaphorical construction. The unequal distribution of cultural capital, according to Bourdieu, was essential in explaining the disparities in academic performances among school children (Bourdieu and Passeron, 1979). The success at school is the specific profits that children can make on the school market. Cultural capital, proposed Bourdieu, can be classified into three types: the embodied, the objectified, and the institutionalized forms (Bourdieu, 1986). The embodied form refers to the competence, skills, etc. acquired by the individual; the objectified form is composed of the physical objects that function in favor of the holders; the institutionalized form consists of institutional recognition that appears, for example, in the form of academic credentials, diplomas, or certificates.

All the three capitals can be translated into assets or resources; thus, they not only mean solid things that economic capital represents such as money and property but also some sort of symbolic attribute. As Figure 2-1 shows, Dale (2004) expounded that these three forms of capitals are mutually interchangeable through a variety of

social mechanisms.<sup>22</sup> To conclude, the more possession of any of the capitals brings more opportunities, directly as economic capital or indirectly as social and cultural capitals, to individuals in pursuit of higher socioeconomic status.

**Figure 2-1: Interchangeability of Capitals<sup>23</sup>**



## 2.5 Linguistic Market and Linguistic Capital

The notion of linguistic market, according to Bourdieu (1993: 79), appears as soon as someone produces an utterance for receivers capable of assessing it, evaluating it, and setting a price on it. The price that the products of a given competence will receive on a given market depends on the laws of price formation specific to that market. As far as the laws of price formation are concerned, Bourdieu pointed out that the value of a given competence depends on the state of relationships within which the values set on the linguistic products of the various producers are defined. In real economic markets, different producers and products possess unequal values and status, and those with better background would naturally try to defend the privileges. This phenomenon also applies to linguistic market. The speakers of a certain privileged language rationally defend their own value as linguistic producers through the defense of a market for their own linguistic products.<sup>24</sup>

<sup>22</sup> Phillipson, Chris, Graham Allan, and David Morgan (ed.). *Social Networks and Social Exclusion: Sociological and Policy Perspectives*. Burlington, VT: Ashgate, pp. 97-115.

<sup>23</sup> This figure demonstrates the interchangeability of capitals, and is made by the author of the thesis.

<sup>24</sup> Bourdieu, Pierre. 1993. *Sociology in Question*. London: SAGE Publications Ltd, pp.78-89.



The concept of linguistic markets encompasses a number of interrelated theories. In addition to the major linguistic market, there exist various small sociolinguistic markets, with which one might feel more closely associated and which might have more influence over individuals. Individual speakers are aware of the value of their language variety as well as that of other language varieties present in that linguistic market; thus, individuals rationally choose which language variety to know and which language variety to use under various situations since it is reasonable to assume that individuals adopt the most profitable behaviors to enhance their socioeconomic status. A speaker might try to fit into the major linguistic market either permanently or temporarily, and this phenomenon would lead to, more or less, changes in linguistic behaviors (this behavioral changes again might result in language shift). The factors that influence individual linguistic behaviors include the speakers' desired social identity, status and recognition.<sup>25</sup>

Linguistic capital, which implies that there exist profits, can be understood as a form of embodied cultural capital in that it represents a means of communication and self-presentation acquired from one's surrounding culture (Bourdieu, 1990). Linguistic capital is power over the mechanisms of linguistic price formation, the power to make the laws of price formation operate to one's advantage and to extract the specific surplus value (Bourdieu, 1993: 80). Linguistic capital can also exist in the institutionalized state, such as when certain languages are accorded recognition or dominant use by authorities. Furthermore, the accreditation of linguistic capital (e.g., which language is more valuable and which accent is more authentic) constitutes a site of symbolic struggle in institutional arenas as well as in daily linguistic

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<sup>25</sup> Simmons, Margaret. 2003. Language Shift and Linguistic Markets in Barcelona. In Lotfi Sayahi (ed.). *Selected Proceedings of the First Workshop on Spanish Sociolinguistics*. Somerville, MA: Cascadilla Press, pp. 11-17.



exchanges.<sup>26</sup>

Furthermore, Bourdieu is concerned with the hegemony of certain linguistic codes that are linked to dominant class. In the advanced societies, where there are constrained linguistic markets, high linguistic capital brings high symbolic profits. Thus, dominant class membership is joined by other social bases for the acquisition of linguistic capital.<sup>27</sup>

## 2.6 Diglossia, Bilingualism, and Multilingualism

Diglossia, as elaborated by Ferguson (1959) in the journal *Word*, is a certain type of bilingualism in a given society in which one language contains high prestige while the other contains low prestige.<sup>28</sup> The concept of diglossia has been extended to include more than two language varieties that participate in such social context. The term “polyglossia” has also been used to refer to cases where many language varieties coexist in a functional relationship (Suzanne, 2000). Karl-Eugen (1994: 46) defined diglossia/polyglossia as the functional selection of two (diglossia) or more (polyglossia) language varieties for use in different social contexts.<sup>29</sup>

As the following Table shows, Ferguson explained that diglossia contains nine characteristic features.

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<sup>26</sup> Lan, Pei-chia. 2003. They Have More Money But I Speak Better English: Transnational Encounters Between Filipina Domestic Workers and Taiwanese Employers. *Identities: Global Studies in Culture and Power*, 10(2): 135-136.

<sup>27</sup> Fowler, Bridget. 1997. *Pierre Bourdieu and Cultural Theory: Critical Investigation*. London: SAGE Publications Ltd, p. 28.

<sup>28</sup> Ferguson, Charles A. 1959. Diglossia. *Word*, 15: 325-340.

<sup>29</sup> Feifel, Karl-Eugen. 1994. *Language Attitudes in Taiwan - A Social Evaluation of Language in Social Change*. Taipei: The Crane Publishing Co., Ltd, p. 46.

**Table 2-1: Characteristic Features of Diglossia<sup>30</sup>**

Language Varieties Features	High Varieties	Low Varieties
1. Function	Used in formal situations	Used in informal situations
2. Prestige	Superior, beautiful, logical, and expressive	Inferior, relatively not elegant
3. Literary Heritage	A sizable body of written literature held in high esteem	Few traditional literary work
4. Acquisition	Acquired through formal education	Acquired through “normal,” “natural,” and informal ways
5. Standardization	Established norm for pronunciation, grammar, and vocabulary	No settled orthography, and wide variation in pronunciation, grammar, and vocabulary
6. Stability	Lasted for centuries, and seldom borrowed words from low variety	Relatively uncoded and unstable, and repeated borrowing of vocabulary items from high variety
7. Grammar	Strict grammatical structure	Simple grammar
8. Lexicon	Normally written including technical terms and learned expressions that have no regular equivalents in the low variety	Popular expressions and the names of very homely objects or objects of very localized distribution
9. Phonology	Closer to the common underlying forms	Farther from underlying forms

According to Table 2-1, the high language variety in a diglossic society is often

<sup>30</sup> This table lists the main points of each feature, and is made by the author of the thesis. For details, please refer to *Diglossia* by Charles A. Ferguson in Wei, Li (ed.). 2000. *The Bilingualism Reader*. London: Routledge, pp. 65-73.

spoken in formal situations and learned in formal institutions. It has a sizable body of written literature with high esteem, an established grammatical, lexical, and phonological structure, and is considered more logical and elegant. On the other hand, the low language variety is usually spoken in informal occasions and acquired from daily life. It does not have long literary tradition, is loosely constructed, and has low social status.

Diglossic societies are not only characterized by the stratification of language varieties, but also by restriction of access. To enter formal or official institutions such as government requires the knowledge of high language variety, whereas the low language variety is spoken mostly in informal or private occasions such as family.

Li Wei (2000: 7) stated that the word “bilingual” primarily describes someone with the possession of two languages and it can also be taken to include the many people in the world who have varying degrees of proficiency in and interchangeably use three, four or even more languages. Multilingualism, as the name suggests, mainly refers to those in possession of more than two languages. Furthermore, it is worth our attention that a multilingual speaker uses different languages for diversified purposes and may not possess the same level of proficiency in each language (Li Wei, 2000: 8).

Two types of multilingualism need further explanations. One is individual multilingualism, which merely refers to those who could speak two or more languages; the other is social multilingualism that depicts a speech community with the availability of different language varieties (Karl-Eugen, 1994: 45).

Four models have been proposed to elucidate the relationships between bilingualism and diglossia: 1. neither bilingualism nor diglossia; 2. bilingualism without diglossia; 3. diglossia without bilingualism; 4. both diglossia and bilingualism.

The first model, which is quite rare nowadays due to globalization, can be seen

only in the smallest and most isolated speech communities. The second model, which usually happens under circumstances of rapid social change, of great social unrest, and of widespread abandonment of prior norms before the consolidation of new ones, occurs when members of the speech community have access to two or more language varieties, but there is limited role differentiation and the languages are used indiscriminately. The third model, which is also rare, occurs when two or more speech communities are united politically, religiously and/or economically into a single functioning unit, notwithstanding the sociocultural cleavages that separate them. The fourth model, which is the most common and most stable one, appears wherever its speakers engage in a considerable range of roles, wherever access to several roles is encouraged or facilitated by powerful social institutions and political processes, and wherever the social roles are clearly differentiated (Karl-Eugen, 1994: 48-49; Fishman, 1967: 29-38).

## 2.7 Language Attitude

An attitude is an individual perception that brings about certain behaviors, but it is also influenced by collective behaviors. Cacioppo and Petty (1982) stated that attitude is the summary of the evaluative nature of one's belief.<sup>31</sup> Sarnoff (1970) defined attitude in a more general sense as learned predispositions to react to an object or class of objects in a favorable or unfavorable way.<sup>32</sup> Predictions of one's behaviors are possible with better understanding of one's attitude; however, this does not suggest that there is an absolute correlation between the two.

In dealing with bilingualism, Baker emphasized the importance of attitude. According to Baker, attitudes are learned, not inherited, and is relatively stable.

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<sup>31</sup> Ryan, Ellen B. and Howard Giles (ed.). *Attitudes towards Language Variation*. London: Arnold, p. 189.

<sup>32</sup> Jahoda, M. and N. Warren (ed.): *Attitudes*. Harmondsworth: Penguin, p. 279.

Nevertheless, individual experiences might affect the formation of attitudes; in other words, knowledge of the social implications that the speakers possess might influence the assessments of the quality and prestige of language varieties. Consequently, Baker argued that attitude change is an important notion in bilingualism. Besides, he also stated that attitudes are crucial in language growth or decay, restoration or destruction (Baker, 1988: 112- 115).

As a consequence, a language attitude, according to Karl-Eugen (1994: 55), is a predisposition to respond evaluatively to perceptual or linguistic signs, and it is learned and relatively enduring. Ryan, Giles and Sebastian (1982: 7) defined language attitude in a broader sense as any affective, cognitive or behavioral index of evaluative reactions towards different language varieties or their speakers<sup>33</sup>. Fasold (1984: 148) claimed that attitudes toward a language are often the reflection of attitudes towards members of various ethnic groups. Edwards (1982: 20) suggested that people's reactions to language varieties reveal much of their perception of the speakers of these varieties. Language attitudes do not produce language behaviors directly; rather, they act as intervening variables that determine language choice. Different social, political, economic, and cultural would create different language attitudes towards language varieties and the speakers.

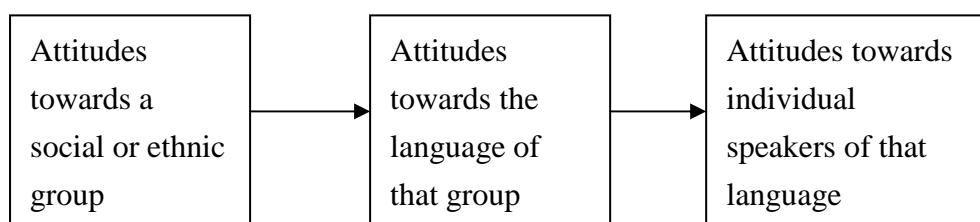
Languages not only serve as a socially neutral instrument for the purpose of communication, but also represent the identities of a social or ethnic group. Rene Appel and Pieter Muysken (1987: 16) proposed that if there is a strong relation between language and identity, this relation should find its expression in the attitudes of individuals towards these languages and their users. Moreover, they further assumed that attitudes relating to social positions of different ethnic or social groups affect attitudes towards cultural institutions or patterns such as language, and then

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<sup>33</sup> Ryan, Ellen B. and Howard Giles (ed.). *Attitudes towards Language Variation*. London: Arnold, p. 7.

carry over to influence attitudes towards individual members of the groups. This assumption is demonstrated in Figure 2-2.<sup>34</sup>

**Figure 2-2: Schema Representing the Formation of Attitudes**



## 2.8 Language Maintenance and Shift

Giles, Bourhis, and Taylor (1977) have proposed three main factors, namely status, demographic, and institutional support to be combined into one general category which they call “ethnolinguistic vitality.” According to Giles *et al.* (1977: 308), high ethnolinguistic vitality will lead minority language to maintenance or even towards extended use, and low vitality will result in shift towards the majority or more prestigious language.

In the following discussion, the vitality model proposed by Giles *et al.* (1977) will be dealt with.<sup>35</sup>

The status factor can be divided into four types.

1. Economic status: if a group of minority language speakers possess low economic status, it is highly likely that they would shift towards the use of the majority language.
2. Social status: social status refers to a group’s self-esteem and is intertwined with economic status. Those who consider themselves to

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<sup>34</sup> *Ibid.*: 16.

<sup>35</sup> *Ibid.*: 33-38.

have lower social status tend to shift towards using languages with higher social status.

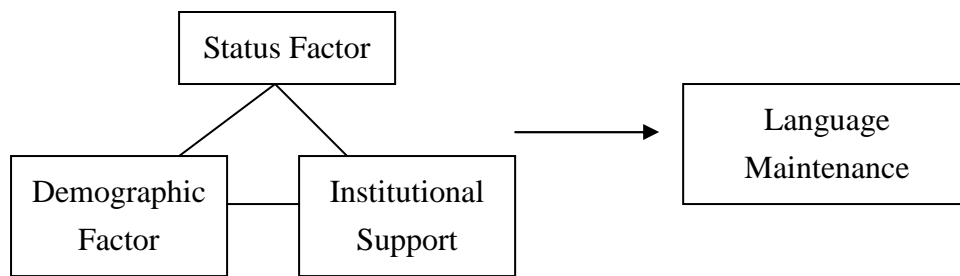
3. Sociohistorical status: this concept is regarded as a mobilizing symbol that inspires individual speakers to defend their memberships as an ethnolinguistic group.
4. Language status: this concept is determined by its exchange value and is closely associated with social status.

The demographic factor puts emphasis on the number of members of a linguistic group and their geographical distribution. The absolute number of speakers is undoubtedly important to the vitality and survival of a language. Furthermore, if the speakers could concentrate in one particular area, the minority ethnolinguistic group might have better chances of maintaining their language.

The third factor formulated by Giles *et al.* (1977) is institutional support. It refers to the extent to which the language of a minority group is represented in the various institutions of a nation, a region or a community. Mass media plays an important role in language maintenance. TV and radio programs that use minority languages help boost these languages, and so do newspapers and books. Besides, mother tongue services provided by governmental sectors increase the usefulness of minority languages. Most important of all, language education should be formally introduced at schools.

Although the aforementioned factors and sub-factors are discussed separately, they have strong correlations with one another. As Figure 2-3 shows, all the factors should be taken as a whole to be able to fully explain the phenomenon of language maintenance.

**Figure 2-3: Factors Affecting Language Maintenance**<sup>36</sup>



According to MacKinnon (2003), language shift refers specifically to the resultant contraction in actual numbers of speakers of a given language which results when the language is no longer used as a language of child-raising or intergenerational transmission.<sup>37</sup> Language shift, a progressive process, could also be defined as the shift by a group of speakers toward another language, while abandoning the native language.<sup>38</sup>

The notion of “shift” here thus means the redistribution of languages over different linguistic domains. When the majority language is spoken in more domains, its value increases and thus has more opportunities to thrive; on the other hand, when the minority language is spoken in fewer domains, its value decreases and would be left in a disadvantaged position. Language shift might come about at a slow pace, but it might carry on for several generations.<sup>39</sup>

Language shift generally involves bilingualism (often with diglossia) that is usually argued as the transitional stage to eventual monolingualism in a new language. When a speech community, once monolingual, is in contact with another language

<sup>36</sup> This figure shows three major factors (need to be considered as a whole) affecting language maintenance, and is made by the author of the thesis.

<sup>37</sup> For more details, please refer to

[http://www.sgrud.org.uk/anfy/celtic/aberystwyth/reversing\\_language\\_shift.htm](http://www.sgrud.org.uk/anfy/celtic/aberystwyth/reversing_language_shift.htm)

<sup>38</sup> Stewart, Thomas W. Jr., and Nathan Vaillette (ed.). 2001. *Language Files: Materials for an Introduction to Language and Linguistics*. Taipei: Bookman Books, Ltd, p. 353.

<sup>39</sup> Appel, Rene, and Pieter Muysken. 1987. *Language Contact and Bilingualism*. New York: Routledge, p.41.



group with better socio-economic backgrounds, the speakers gradually become bilingual until their own language is given up altogether.<sup>40</sup>

Factors that are strong predictors for language shift include a literary-cultural value that would maintain the prestige of the minority group's native language, the function of each language in social advancement, and the relative usefulness of each language (Hasson 2005: 982).

It is widely agreed that language maintenance and shift are the long-term and collective consequences of consistent patterns of language choice.<sup>41</sup> These two phenomena could happen with intentional involvement from the society. It is evident that as long as each language in a bilingual community retains a specific function, native language maintenance will continue; if the dominant language displaces the native language, there will be language shift (Hasson 2005: 982).

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<sup>40</sup> Romaine, Suzanne. 2000. *Language in Society: An Introduction to Sociolinguistics*. New York: Oxford University Press, p. 51.

<sup>41</sup> Fasold, R. W. 1984. *The Sociolinguistics of Society*. New York: Blackwell, p. 239.

# CHAPTER THREE

## ETHNOLINGUISTIC GROUPS, LANGUAGE VARIETIES, AND LANGUAGE HISTORY OF TAIWAN

Taiwan is an island of approximately 23 million people with a combined area of approximately 36,000 square kilometers (13,900 square miles), making it slightly smaller than the Netherlands.<sup>42</sup> Taiwan is located east of the Taiwan Strait, and close to the southeastern coast of mainland China. Although relatively small and not rich in natural resources, Taiwan has always been a destination of immigrations and a coveted island for military and economic purposes due to its strategic location. Frequent transitions of ruling regimes have further diversified the ethnic structure and complicated ethnic relations. As a consequence, linguistic struggles have always been a common phenomenon throughout the history of Taiwan.

**Table 3-1: Relation between Language and Political Status in Taiwan<sup>43</sup>**

Period	Political status	Spoken Languages	Writing Systems
-1624	Tribal society <sup>44</sup>	Aboriginal	Tribal totem
1624-1661	Dutch colonialism	Aboriginal Hoklo Hakka	Sinkang (新港文) Classical Han (文言文)
1661-1683	Koxinga colonialism	Aboriginal Hoklo Hakka	Sinkang Classical Han

<sup>42</sup> Refer to <http://www.gio.gov.tw/taiwan-website/5-gp/yearbook/ch01.html>

<sup>43</sup> Adapted from: Chiung, W.T. 2002. *Language, literacy and power: a comparative study of Taiwan and Vietnam*. Paper presented at the 8th Annual North American Taiwan Studies Conference, University of Chicago, June 27-30, 2002, as well as at the International Conference on Language and Empowerment, Kuala Lumpur, April 11-13, 2002, p. 15.

<sup>44</sup> Hunting and gathering society in terms of economic activities.

1683-1895	Qing colonialism	Aboriginal Hoklo Hakka	Classical Han Koa-a-chheh (歌仔冊) Peh-oe-ji (白話字) Sinkang
1895-1945	Japanese colonialism	Aboriginal Hoklo Hakka Japanese	Japanese Classical Han Colloquial Han (in Hoklo and Hakka) Colloquial Han (in Mandarin) Peh-oe-ji Kana-Taiwanese (臺式假名)
1945-2000	KMT colonialism	Aboriginal Hoklo Hakka Mandarin	Mandarin Hoklo Hakka Aboriginal

As Table 3-1 shows, Taiwan has experienced frequent transitions of ruling regimes, and thus the major spoken languages and writing systems have also been on a constant change.

The following sections will further discuss the ethnolinguistic settings, different language varieties, and the evolutions of spoken and written languages of Taiwan. Section 3.1 elaborates different ethnolinguistic groups; section 3.2 introduces the diverse language varieties; section 3.3 and 3.4 expound the evolutions of spoken and written languages of Taiwan.

### 3.1 Ethnolinguistic Groups in Taiwan

Due to the fact that language is frequently used to rouse the ethnic self-awareness of group members, an ethnolinguistic group is defined as those people that identify and are identified by others as sharing a common ancestral and linguistic

origin.<sup>45</sup>

There are a few ways to categorize the people in Taiwan.

Some suggest that all the people in Taiwan should be called Taiwanese which is further divided into Han Chinese and indigenous Taiwanese, and Han Chinese is again further divided into Hoklo, Hakka, and Chinese Mainlanders. Some argue that people in Taiwan could be classified into Bensheng Ren (本省人, people from within the province) and Waisheng Ren (外省人, people from outside the province), and Bensheng Ren consists of Hoklo and Hakka people.

In this section, Hoklo, Hakka, aboriginal people, and Chinese Mainlanders are discussed separately without putting them into any specific categories since it has always been difficult and controversial to define ethnicity in Taiwan.

### 3.1.1 Aboriginal People

The aboriginal people, whose languages belong to Austronesian-Formosan language family, have resided in Taiwan for thousands of years. From Han perceptions and based where they lived, these tribes were roughly divided into two different groups. The first group refers to Shou-fan (熟番; ripe barbarians, civilized barbarians) or Pingpu (平埔族; groups of the plains). The term Shou-fan indicates that they were more or less blended into Han societies, and the term Pingpu means that they lived in the plains of western Taiwan. The second group refers to Sheng-fan (生番; rude barbarians, uncivilized barbarians) or Gaoshan (高山族; groups of the mountains), which suggests that these people were out of Han influence and resided in mountain areas of Taiwan. Pingpu consists of Siraya (西拉雅), Ketagalan (凱達格蘭), Kavalan (葛瑪蘭), Taokas (道卡斯), Pazch (巴則海), Papura (巴布拉), Babuza (貓霧

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<sup>45</sup> Feifel, Karl-Eugen. 1994. *Language Attitudes in Taiwan - A Social Evaluation of Language in Social Change*. Taipei: The Crane Publishing Co., Ltd, p. 26.

揀), Hoanya (洪雅), and Thao (邵). Gaoshan is composed of Atayal (泰雅), Saisiyat (賽夏), Bunun (布農), Tsou (鄒), Rukai (魯凱), Paiwan (排灣), Amis (阿美), Puyuma (卑南), and Yami (雅美).<sup>46</sup>

According to the Council of Indigenous Peoples (行政院原住民委員會), the number of aboriginal people in Taiwan is around four hundred ninety thousand, about 2% of the total population. Currently, 14 groups have been recognized by the government. They are the Amis, Atayal, Paiwan, Bunun, Puyuma, Rukai, Tsou, Saisiyat, Yami, Thao, Kavalan, Truku (太魯閣), Sakizaya (撒奇萊雅), and Sediq (賽德克).<sup>47</sup>

### 3.1.2 The Hoklo

Hoklo (福佬, 鶴佬) is the name of a group of people and also the name of a language variety spoken by those people.<sup>48</sup> Hoklo are also called Minnan Ren (閩南人) and their language Minnan Hua (閩南話). Some scholars suggest that nowadays the term Taiwanese should be justified to replace the term Hoklo. Nonetheless, this thesis still adopts the term Hoklo since the academic and civil society of Taiwan has not yet reached an agreement on this issue.

The ancestors of the Hoklo, who started immigrating to Taiwan during the 17th and 18th centuries, mostly came from Changchou (漳州) and Chuanchou (泉州) prefectures of Fujian province (福建省, a coastal province of southeast China). Today, according to Government Information Office (GIO, 行政院新聞局), the Hoklo constitutes the largest ethnolinguistic group in Taiwan, accounting for approximately

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<sup>46</sup> Tsao, Feng-fu. 1999. The Language Planning Situation in Taiwan. *Journal of Multilingual and Multicultural Development*, 20(4 & 5): 329-330.

<sup>47</sup> Refer to

[http://www.apc.gov.tw/main/docDetail/detail\\_ethnic.jsp?cateID=A000427&linkSelf=147&linkRoot=101](http://www.apc.gov.tw/main/docDetail/detail_ethnic.jsp?cateID=A000427&linkSelf=147&linkRoot=101)

<sup>48</sup> In Taiwan, nowadays a great number of non-Hoklo people are also able to speak Hoklo.

70% of the population.<sup>49</sup>

### 3.1.3 The Hakka

The term Hakka literally means “guest family” or “guest people”. Hak means guest and ka means family or people.

Most of the Hakka immigrants arrived Taiwan only after the middle period of Qing Dynasty. Due to the differing immigration period, environment, reciprocity and conflict between Hoklo immigrants, the Hakka moved a couple of times into inner regions of the island after immigrating to Taiwan. Moreover, some Hakka were assimilated by Hoklo because of their disadvantaged social, political, and economic status.<sup>50</sup>

At present, approximately 15% to 20% of the population is composed of Hakka. They are mostly concentrated in Hsinchu City, Hsinchu County, Miaoli County, Chungli in Taoyuan County, Meinong in Kaohsiung County, and in Pingtung County. Hualien and Taitung County in the east could also find some smaller presences. In recent decades, Taipei, Taichung, and Kaohsiung metropolitan areas have been attracting more and more Hakka due to economic reasons.

Although there are a significant number of Hakka in Taiwan, they are still disadvantaged from political and economic perspectives. As a result, Hakka tend to conceal their identities in order to smoothly mingle with other ethnic groups, especially Hoklo since they comprise the majority of the population and could be found all over Taiwan, and ward off prejudices that might have a negative impact upon their survival and development. Thus, the concept of “Hoklo Hakka” (福佬客) is gradually recognized and discussed by the academia.

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<sup>49</sup> Refer to <http://www.gio.gov.tw/taiwan-website/5-gp/yearbook/ch02.html>

<sup>50</sup> Refer to <http://www.hakka.gov.tw/ct.asp?xItem=22244&ctNode=2211&mp=2210>

Today, it is not surprising that many Hakka in Taiwan are able to fluently speak Hoklo language variety and (or) Mandarin. However, it would be rare that people of the other ethnic groups are capable of speaking proficient Hakka language variety. This phenomenon depicts an unbalanced interaction between Hakka and people of other ethnic origins (especially Hoklo). Nowadays, quite a few Hakka youth have completely lost the ability to speak Hakka language variety, and, to make things worse, some of the Hakka youth even forget, deny, or ignore their original identity with an eye to smoothly blending into the mainstream culture.

### **3.1.4 The Chinese Mainlanders**

The term Chinese Mainlander (hereafter Mainlander), or Waisheng Ren (外省人, meaning people from external provinces), functions as an ethnic marker that collectively refers to those Chinese immigrants, regardless of their diverse provincial backgrounds, who came from mainland China after World War II or 1949, and also refers to their offspring born in Taiwan.

After the civil war against the Chinese communists on the mainland, the ROC government retreated to Taiwan with a sudden influx of approximately one million to two million immigrants.<sup>51</sup> These immigrants were composed of people from different provinces of mainland China, and thus they spoke a number of mutually unintelligible Chinese language varieties. In spite of the linguistic diversity, common experiences in politics and army united them into a social group.

About half of the Mainlander groups came from Mandarin areas, but this did not imply that all these people were able to speak standard Mandarin owing to the influence of their strong hometown accents. More than 40% of them originated from

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<sup>51</sup> There is no consensus from scholars upon the exact number of Chinese immigrants so that the number varies between 1.5 to 2 million people.

southeast China and spoke the language varieties of the provinces of Fujian (15%), Chekiang (浙江, 9%), Guangdong (8%), Hunan (湖南, 8%), and Kiangsi (江西, 4%), as their mother tongues.<sup>52</sup>

In the beginning, the Mainlanders were generally regarded as a socially and politically privileged group, despite the fact that some of them were also distributed at the lower level of the society. With Mandarin functioning as the lingua-franca and unifying force, they as a powerful minority eventually form a distinct ethnolinguistic identity quite different from the other ethnic groups. As a consequence, the mainlanders in the early years rarely made any effort to learn Hoklo or Hakka. However, with Taiwan dramatically going through a number of political, economic, and social changes, the Mainlanders and their descendants gradually became bilingual in Mandarin and Hoklo or Hakka. Today the Mainlanders account for approximately 13 % of the population.<sup>53</sup>

### 3.2 Language Varieties in Taiwan

Generally speaking, there are four major language varieties in Taiwan: Hoklo, Hakka, Mandarin, and aboriginal language varieties. However, this thesis regards Taiwan Guoyu as one language variety despite the fact the Taiwan Guoyu speakers are declining.

#### 3.2.1 Hoklo Language

Hoklo language, the first Chinese language variety spoken in Taiwan, is also called Minnan Hua (閩南話), Taiyu (台語) or Taiwanese. It was originally composed

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<sup>52</sup> Van den Berg, Marinus E. 1986. *Language and Language Use in Taiwan: A Study of Language Choice Behavior in Public Settings*. Taipei: Crane Publishing Co, p. 46.

<sup>53</sup> Feifel, Karl-Eugen. 1994. *Language Attitudes in Taiwan - A Social Evaluation of Language in Social Change*. Taipei: The Crane Publishing Co., Ltd, p. 29.



of two main dialects spoken in Changchou and Chuanchou districts of Fujian province of mainland China. Nonetheless, these two dialects have been continuously influenced by local characteristics of different places in Taiwan. Today the Hoklo language variety spoken in Taiwan is a mixture of Changchou and Chuanchou dialects coupled with local Taiwanese influences. The Hoklo speakers nowadays are prone to identify themselves as a single ethnolinguistic group regardless of different dialects that they use.

Today there are four major Hoklo dialects in Taiwan: Southern dialect (南部腔), Northern dialect (北部腔), Hai-kou dialect (海口腔), and Nei-pu dialect (內埔腔). Southern dialect, which carries more Changchou influence and is the dominant Hoklo dialect in Taiwan, ,mainly spreads from Zhoushui River (濁水溪) to the south of Taiwan except coastal areas. Tainan (台南) dialect is representative of Southern dialect. Northern dialect, which carries more Chuanchou influence, mainly spreads from Zhoushui River to the north of Taiwan. Taipei (台北) dialect is representative of Northern dialect. Hai-kou dialect, called Chuanchou dialect in the beginning and originally came from Chuanchou and Tung-an (同安) in Fujian, is distributed in the places where rivers and ocean meet, such as Tamshui (淡水), Shalu (沙鹿), and Lugang (鹿港). Nei-pu dialect, which still retains characteristics of traditional Changchou dialect, can be found in Yilan (宜蘭), Chiufen (九份), Keelung (基隆), and Taoyuan (桃園).<sup>54</sup>

Hoklo language variety in Taiwan has been influenced by other language varieties such as Japanese and Mandarin. Traces of foreign influences could be easily found in some Hoklo pronunciations, terms and grammar. Scholars are now working on the standardization of Hoklo, and a lot still needs to be done.

With so many unique influences and developments, the Hoklo spoken in Taiwan

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<sup>54</sup> Refer to <http://www.lhvs.tn.edu.tw/mina5/p4-5.htm>

has transformed into a special kind of language variety, which is quite different from that spoken in where it originated.

### 3.2.2 Hakka Language

Hakka language is not mutually intelligible with any of the other local language varieties in Taiwan. Because of the different origins of the Hakka people in Taiwan, the Hakka language variety can be classified into six dialects: Sze Hsien (四縣腔), Hai Lu (海陸腔), Ta Pu (大埔腔), Shaon An (詔安腔), Rao Ping (饒平腔), and Yung Ting (永定腔).<sup>55</sup>

Sze Hsien dialect is mainly spoken in Taoyuan, Miaoli (苗栗), Pingtung (屏東), and Liu Tui (六堆) in Kaohsiung (高雄). Hsinchu (新竹) and some areas of Hualien (花蓮) are where the Hai Lu dialect speakers concentrated in. Ta Pu and Shaon An dialects distribute in Tung Shih (東勢) in Taichung (台中) and Lun Pei (崙背) in Yunlin (雲林) respectively. Rao Ping and Yung Ting dialects are sporadically distributed in Taiwan.<sup>56</sup>

Unlike Hoklo language variety or Mandarin, Hakka language variety neither has a large number of speakers nor is it enjoys high public support. Thus, the waning of Hakka language variety is predictable. To adapt themselves into the society as minority language speakers, many Hakka have become bilingual or even multilingual in Hoklo language variety and/or Mandarin; but ironically, Hakka language variety is rarely learnt as a second language throughout Taiwan.

The decline of Hakka language variety is relatively slow in Taoyuan, Hsinchu, and Miaoli since these three areas enjoy relatively more demographic strength;

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<sup>55</sup>張民光，2003 年，The Status Quo and Future Trend for Hakka Dialect in Taiwan，聯合技術學院聯合學報第 23 期，第二頁。

<sup>56</sup> It is difficult to have a precise account of the distribution of Hakka accents nowadays because of frequent moving of people. Thus, here I only briefly introduce representative places with representative accents.

however, Hakka language variety is hardly heard except these three places. Among the six dialects, Sze Hsien dialect has the strongest influence. And it will not pose a great challenge to preserve Hai Lu dialect since its speakers are densely populated in Hsinchu. Shaon An and Rao Ping dialects are in the most danger of disappearance since they exist in areas with low Hakka density and thus have few opportunities of exposure.

### 3.2.3 Mandarin

Mandarin is mostly known as Guoyu (國語), which literally means national language, by Taiwanese people. Although originated from northern China, it is often believed that the standard Mandarin in Taiwan today has developed its own uniqueness in writing systems, accents, terminologies and pronunciations, which make it quite different from the Mandarin, called Putong Hua (普通話), in mainland China.

Before the promotion of Mandarin by ROC, Mandarin was virtually unknown to most Taiwanese people. To establish legitimate rule over Taiwan, the ROC government harshly promoted Mandarin as a symbol to cultivate a sense of Chinese nationhood and, above all, to de-Japanize and re-Sinicize the Taiwanese people. As a consequence, when the ROC rule began, the majority of the population, including a large number of Mainlander immigrants that originated from places where Mandarin was not spoken natively, was forced to acquire Mandarin as a second or even third language.

During the early period of promoting Mandarin, Mandarin was still a minority language variety. Therefore, influences from local language varieties such as Hoklo and Hakka became inevitable. Nowadays, it is widely agreed that Mandarin has lost its original flavor.

It goes without saying that the post-war language policy designed to promote and spread Mandarin was overwhelmingly successful. At present, most of the people in Taiwan could communicate in Mandarin, both in speaking and writing forms. It is still the major language in education, mass media, and most of the public domains. Although a number of mother tongue courses have been provided at schools, these local language varieties are still unable to challenge the dominant status of Mandarin. In addition, the language use in Taiwan is inclined to exhibit a stratified pattern determined by age. The older generation predominantly communicates in their mother tongues; the middle generation uses both mother tongues and Mandarin; the younger generation primarily uses Mandarin. Furthermore, people in Taiwan today generally associate Mandarin with better education, higher socio-economic status, and more opportunities for upward mobility when compared with Hoklo, Hakka, and aboriginal languages.

#### **3.2.4 Taiwan Guoyu**

Strongly influenced by Hoklo pronunciation, vocabulary and grammar, Taiwan Guoyu is a type of Mandarin spoken with conspicuous Hoklo characteristics. Unlike the other local language varieties, Taiwan Guoyu is intelligible to Mandarin speakers. Although it is not considered a formal language variety, it is still worth mentioning since it is unique in Taiwan.

Taiwan Guoyu is mostly spoken by native Hoklo speakers who did not or were unable to learn Mandarin well when they were young due to the linguistic differences and mutual influences between Mandarin and Hoklo. Taiwan Guoyu is usually associated with Hoklo people, poor education and low socio-economic status. It is considered vulgar by the public, and thus people in Taiwan generally look down upon or make fun of Taiwan Guoyu and its speakers.

Nowadays, with better Mandarin education, Taiwan Guoyu has become rare except in the older generation.

### **3.2.5 Aboriginal Languages**

Each of the fourteen officially recognized aboriginal groups in Taiwan has its own language. These aboriginal languages are known as Formosan groups in Taiwan, and Yami (Malayo-Polynesian language) of Orchid Island. The use of these languages is highly restricted since the population of each aboriginal group is quite small.

Aboriginal people growing up in the environment filled with Mandarin and Hoklo speakers, the new generation has become more fluent in Mandarin and Hoklo than their mother tongues. Besides, Mandarin and Hoklo have served as the intergroup communication tools.

## **3.3 Evolution of Spoken Language of Taiwan**

Since Taiwan has experienced frequent political transitions, the speaking practices of Taiwan have also received a number of influences from various ruling regimes. This thesis divides the evolution of spoken language of Taiwan into seven periods: before seventeenth century, European colonial, Koxinga, Qing dynasty, Japanese rule, ROC government to present.

### **3.3.1 Before Seventeenth Century**

The exact ancient linguistic makeup of Taiwan is still unknown. Though now the majority of the population in Taiwan is Han Chinese, scholars still could not reach an agreement on when the Chinese acquired knowledge of the island and began to immigrate there.

Before Chinese immigration from the mainland took place, there were groups of

early Austronesian language speakers. These Neolithic inhabitants cultivated millet, taro, yams, rice, and beans, and also lived on hunting and gathering from six thousand years ago. Collectively referred to as the aboriginal people of Taiwan, these non-Sinitic people significantly outnumbered other later settlers on the island until seventeenth century.<sup>57</sup> That is, aboriginal languages, though without writing systems, were the most widely spoken languages before seventeenth century in Taiwan.

Due to the close distance between Taiwan and mainland China, the Chinese started emigrating to Taiwan, and after a few waves of mass immigration during the second half of the seventeenth century, Chinese composed the greater part of the population.<sup>58</sup> As the number of Chinese immigrants grew, the aboriginal people that lived in the Western plain had more opportunities to be in contact with them. The aboriginal people were either assimilated or forced to move into the mountainous areas. Besides, intermarriages were also very common. As time went on, these aboriginal languages were gradually replaced and lost the dominant status in the language history of Taiwan.<sup>59</sup>

### **3.3.2 European Colonial Period (1624-1661)**

Taiwan became a Dutch colony in 1624.<sup>60</sup> The Dutch were more aware of the value of Taiwan compared with the negligent management from Ming Dynasty. The Dutch was highly interested in developing Taiwan into a profitable colony for future exploitation since it was an ideal trading base with fertile land. As a result, the Dutch

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<sup>57</sup> Simpson, Andrew. (ed.). *Language and National Identity in Asia*. New York: Oxford University Press, p. 237.

<sup>58</sup> Beaser, Deborah. 2006. *The Outlook For Taiwanese Language Preservation*. Sino-Platonic Papers No. 172, p. 4.

<sup>59</sup> Chiung, W. T. 1999. *Language Attitudes toward Taibun- the Written Taiwanese*. Master's thesis, University of Texas at Arlington, pp. 4-5.

<sup>60</sup> Ming Dynasty did not regard Taiwan as its territory, so the Dutch invasion of Taiwan was not harshly intervened. However, the Dutch abandoned occupation of the Pescadores since Ming Dynasty claimed sovereignty over the islands and protected the islands with military actions.

government needed laborers, and the nearby mainland China gradually became an important source of laborers. Furthermore, wars and natural disasters that was plaguing China also forced the Chinese to leave their homes to search for new lives in Taiwan. Thus, the number of Chinese immigrants increased rapidly. These Chinese immigrants were mostly from the southeast provinces of China so that most of them spoke either Hoklo or Hakka language varieties.

Nevertheless, during Dutch colonial period, the population was still composed mostly of the aboriginal people. The number of the aboriginal people was around one hundred fifty thousand to two hundred thousand while that of the Chinese was around five thousand to twenty five thousand and the Caucasians around three thousand.<sup>61</sup> In other words, the most common language during this period was the mutually unintelligible aboriginal languages.

The Dutch language did not have much influence on local speaking practices. On the one hand, the number of Dutch people was relatively small and most of them lived in a few forts (such as Provintia and Zeelandia) and settlements on the western coast of Taiwan; on the other, their interactions with the local people were limited to trade, agriculture, and Christianization of the populace.<sup>62</sup>

Besides the Dutch, the Spanish also wanted to expand their power to Taiwan for trading purposes. After a few military clashes between the Dutch and Spanish, the Spanish successfully seized control of northern Taiwan, but its rule was severely obstructed and short. The Spanish also brought Chinese immigrants to Taiwan to work. In 1642, the Spanish were driven out by the Dutch. In a word, the Spanish only had very minor influence over the linguistic makeup of Taiwan.

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<sup>61</sup>洪惟仁，1995，” 台灣的語言戰爭及戰略分析”，發表於1995年第一屆台灣本土文化學術研討會，台北：國立台灣師範大學，1995年7月。第二頁。

<sup>62</sup> Sandel, Todd. L. 2003. Linguistic capital in Taiwan: The KMT's Mandarin language policy and its perceived impact on language practices of bilingual Mandarin and Tai-gi speakers. *Language in Society*, 32, p. 528.



Some other European powers during this period had visited Taiwan, but did not leave any lasting impacts.

### 3.3.3 Koxinga Period (1661-1683)

Koxinga, one of the remnant force leader that strived to restore Ming dynasty (明朝, 1368-1644), was mainly in control of the coastal areas of southeast China. After being defeated in trying to retake the capital, Koxinga decided to retreat to Taiwan and transform it into a base against Qing dynasty. As a result, Koxinga successfully drove away the colonial Dutch government and then established another ruling regime, the first political regime set up by Han people in the history of Taiwan.<sup>63</sup>

Koxinga was from southern Fujian, and so were most of his followers. Thus, they spoke Hoklo language variety mostly.<sup>64</sup> At the end of Koxinga regime, approximately one hundred fifty thousand Chinese people lived in Taiwan. From then on, the aboriginal people were outnumbered by the Chinese.

Hence, we could deduce that aboriginal languages and Hoklo language variety were commonly spoken while Hakka also played a role during this period.

### 3.3.4 Qing Dynasty Period (1683-1895)

Taiwan came under the official control of mainland China for the first time in 1684. During this period, poor Han Chinese kept moving to Taiwan to seize land despite several prohibitions set up by the Qing dynasty against immigration to Taiwan in the early stage. Due to the geographic proximity to Taiwan, almost all of the immigrants originally came from the two southeast provinces of China: Fujian and

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<sup>63</sup> Chiung, W. T. 1999. *Language Attitudes toward Taibun- the Written Taiwanese*. Master's thesis, University of Texas at Arlington, p. 7.

<sup>64</sup> Tsao, Feng-fu. 1999. The Language Planning Situation in Taiwan. *Journal of Multilingual and Multicultural Development*, 20(4 & 5): 331.



Guangdong (廣東). Those from Fujian were further divided into two groups according to their respective hometown prefectures: Changchou people (漳州人) and Chuanchou people (泉州人). These two groups of people were lumped together and called Hoklo. Their language has also been called Hoklo despite that they spoke different dialects of Hoklo. The third group that migrated primarily from Guangdong was Hakka and their language has also been called Hakka.<sup>65</sup>

Among the Chinese immigrants, Changchou people and Chuanchou people roughly consisted of 80% of them. In other words, Hoklo was spoken predominantly in Taiwan during Qing rule. On the contrary, those of Guangdong origin only accounted for about 15%, making the Hakka language occupy a marginal position in society.<sup>66</sup>

### 3.3.5 Japanese Rule Period (1895-1945)

Taiwan was ceded to Japan at the end of Sino-Japanese War in 1895. The shift of Taiwan from a Chinese territory to a Japanese colony undoubtedly brought a significant impact on the speaking practices of Taiwan. One of the goals of Japan's occupation of Taiwan was to completely assimilate the local Taiwanese people into Japanese culture and way of life. Therefore, a strict language policy that aimed at the eradication of all local languages was imposed upon Taiwan.<sup>67</sup>

Japanese was thus promoted by the government and became the lingua franca of various language groups. Consequently, a large portion of Taiwanese population was bilingual, with their first language being either Hoklo or Hakka and their second Japanese.<sup>68</sup>

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<sup>65</sup> Hsiau, A-chin. 2000. *Contemporary Taiwanese Cultural Nationalism*. London: Routledge, p. 4.

<sup>66</sup> *Ibid.*

<sup>67</sup> Beaser, Deborah. 2006. *The Outlook For Taiwanese Language Preservation*. Sino-Platonic Papers No. 172, p. 3.

<sup>68</sup> Chang, Mei-yu. 1996. *Language Use and Language Attitudes among Taiwanese Elementary School*

Table 3-2 shows the percentage of the Taiwanese population able to comprehend Japanese during a 40-year span (from 1905 to 1944), as published by the colonial Taiwan General Government. By 1944, one year before the end of colonization, 71% of Taiwanese understood Japanese.<sup>69</sup>

**Table 3-2: The Growing Percentage of Taiwanese Population Understanding Japanese (1905-1944)**

Year	1905	1915	1920	1925	1932	1933	1934
%	0.38	1.63	2.83	6.00	22.7	24.5	27
Year	1935	1936	1937	1938	1939	1940	1944
%	29	32.3	37.8	41.9	45.59	51	71

Taiwan local languages were severely suppressed; nevertheless, they did survive this period in a few different forms. Even though they were restricted to the private domain, many people continued to educate their children in their local languages.<sup>70</sup> Although Japanese had become the dominant language in the public sphere, by the mid-1940s language use was stratified. The older generation relied on native languages, the middle generation had mixed native tongue/Japanese ability, and the younger generation tended toward use of Japanese. Local Taiwan languages were still quite active in other domains, however, and did not completely bow down under the influence of Japanese hegemony.<sup>71</sup>

To sum up, during this period, Japanese was the colonial and dominant language

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*Students in Native Language Instruction Programs: A Study on Language Maintenance, Language Shift, and Language Planning in Taiwan*. Ph. D. dissertation, Indiana University, p. 68.

<sup>69</sup> Li, Chin-an. 2008. Lexical influence of language policies on Taiwanese novel writing, 1924-1998: a computer-assisted corpus analysis. *Journal of National Taiwan Normal University*, 53(1): 66-67.

<sup>70</sup> Beaser, Deborah. 2006. *The Outlook For Taiwanese Language Preservation*. Sino-Platonic Papers No. 172: pp. 3-4.

<sup>71</sup> Brubaker, Brian Lee. 1995. *Language Attitudes and Identity in Taiwan*. Master's thesis, University of Pittsburgh, p. 19.

in the public sphere. However, in the private sphere, native languages such as Hoklo and Hakka were popular. Mandarin was rarely spoken.

### **3.3.6 ROC Government Period (1945 to Present)**

When Japan was defeated in World War II, it was KMT (Kuomintang or Chinese Nationalist Party, 中國國民黨) that immediately sent troops and official representatives to Taiwan to take control. In 1949, the entire Republic of China government relocated to Taiwan after the civil war with the Communists in mainland China. Since then, more than one million Chinese people (including soldiers, officials, workers and refugees) that spoke various Chinese language varieties immigrated to Taiwan with KMT. And another language genocide was repeated.

Owing to decades of Japanese occupation, Japanese culture and language were ubiquitous, a phenomenon that made the ROC government unable to fully trust the local Taiwanese people. As a result, efforts to “de-Japanize” and “re-Sinicize” the population were launched. One of the policies was the promotion of Mandarin as the *lingua franca*.

Even though Hoklo language variety, followed by Japanese, was most widely spoken in Taiwan while the number of people able to speak Mandarin was quite limited, Mandarin was still proclaimed the National Language and the system of diglossia was imposed upon Taiwanese society especially during martial law period. Thence, Mandarin was regarded as the only “high” language while all the other local language varieties were considered “low,” and this distorted perception of languages still, more or less, exists even nowadays. Proficiency in Mandarin thus became one of the necessary conditions to work or get promoted in the public sector and to obtain a higher socio-economic status.

Gradually, Taiwanese people became more and more fluent in Mandarin.

90% of those born in Taiwan in 1965 were able to understand Mandarin in 1973. By 1991, 90% of the population was able to speak Mandarin. A survey that conducted among students in the mother tongue classes in Taipei County in 1996 found that most parents spoke Mandarin instead of the mother tongues to their children. On average, nearly 72% of language use at home was Mandarin. Table 3-3 illustrates the situation.<sup>72</sup>

**Table 3-3: Language Use at Home in Taipei County in 1996<sup>73</sup>**

	Father to child	Mother to child	Between siblings
Mandarin	66.5%	69.7%	79.6%
Hoklo	29%	26%	14.6%
Hakka	2.4%	2.5%	1.4%
Aboriginal	0.7%	0.7%	0.4%
Others	0.2%	0.4%	3.4%

In summary, Mandarin gained its dominant status during this period while all the other local language varieties gradually lost their territories.

### 3.3.7 Present Situation

Although the government is no longer controlled by an authoritarian regime, Mandarin is still the national language, and the most widely-used language of the academic world. People are free to express themselves in any language they choose; however, Mandarin remains the predominant language of the media.<sup>74</sup>

A research conducted in 2004 concluded that Hoklo spoke Hoklo language variety more fluently than Mandarin; however, both Hakka and aboriginal people

<sup>72</sup> Li, Chin-an. 2008. Lexical influence of language policies on Taiwanese novel writing, 1924-1998: a computer-assisted corpus analysis. *Journal of National Taiwan Normal University*, 53(1): 68.

<sup>73</sup> *Ibid.*

<sup>74</sup> Beaser, Deborah. 2006. *The Outlook For Taiwanese Language Preservation*. Sino-Platonic Papers No. 172, p. 6.

spoke more fluent Mandarin than their mother tongues. Moreover, the Mandarin fluency of Hoklo, Hakka and aboriginal people exhibited a continual drop from the young to the old while their proficiency in mother tongues moved in the opposite direction. As far as the younger generation is concerned, Mandarin is the common language of today. Fluency in Mandarin among the youth has increased tremendously while fluency in Hoklo, Hakka and aboriginal languages decreased by a large scale. This lack of enthusiasm towards local language usage is the key reason that could lead to their demise. Education also had a great impact on Mandarin proficiency. People with high education spoke better Mandarin than those with low education.<sup>75</sup>

In public settings, Mandarin has always been dominant while the rest of the local language varieties mostly function in private domains. However, since the opposition DPP (Democratic Progressive Party, 民主進步黨) won the presidential election in 2000, the situation has somewhat turned in favor of a multicultural and multilingual society. To promote aboriginal and Hakka cultures, the Council of Indigenous Peoples and the Council for Hakka Affairs were established in 1996 and 2001 respectively; moreover, Hakka TV Station and Taiwan Indigenous TV Station were founded in 2003 and 2004 respectively. After the establishment of the government agencies and TV stations, Hakka and aboriginal people have found themselves a powerful mechanism of preserving and promoting their mother tongues as well as cultures. The certifications of Hoklo, Hakka, and aboriginal language proficiency (台、客、原住民語言認證) have also encouraged students to learn and appreciate the beauty of their mother tongues. Academic institutes since 2000 have sprung up to do researches on these local language varieties.

In a word, although the speaking practice in Taiwan is still dominated by

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<sup>75</sup> Yeh, Hsi-nan, Hui-chen Chan, and Yuh-show Cheng, 2004. Language Use in Taiwan: Language Proficiency and Domain Analysis. *Journal of Taiwan Normal University: Humanities & Social Sciences*, 49(1): 99-100.

Mandarin, Hoklo, Hakka, and aboriginal language varieties are gradually obtaining attention from people in Taiwan.

### 3.4 Evolution of Written Language of Taiwan

The first writing system that appeared in the history of Taiwan was the Romanization written in Sinkang, a type of writing used by the Siraya group of the plains during Dutch occupation of Taiwan in the 17<sup>th</sup> century.<sup>76</sup> “Sinkang manuscripts” (新港文書), documents written in such kind of Romanization system devised by the Dutch colonists in the language of the Siraya people, are important historical materials that we can find today. Most of the documents of Sinkang manuscripts are records of land contracts and business transactions.<sup>77</sup> Furthermore, the Dutch missionaries also took advantage of the Romanized language to preach Christian belief and educate the natives; thus, some textbooks and testaments are also found written in the same Romanization system. Some Sinkang manuscripts are bilingual: in Siraya and Dutch, or Siraya and Chinese.<sup>78</sup> After the Dutch were driven out of Taiwan by Koxinga, the Sinkang Romanization continued to be used by the aboriginal people for over one hundred fifty years.<sup>79</sup>

During Koxinga and Qing dynasty periods, classical Han and Koa-a-chheh writings were introduced to Taiwan and the former became official written language while the latter was only for the ordinary people. Because of the imperial examination system (科舉制度) and government official system (文官系統) of the Qing dynasty, those who strived to become a scholar or government official had to learn Han

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<sup>76</sup> Chiung, W. T. 1999. *Language Attitudes toward Taibun- the Written Taiwanese*. Master's thesis, University of Texas at Arlington, p. 23.

<sup>77</sup> Refer to <http://pinyin.info/news/2006/taiwans-first-written-language-in-romanization/>

<sup>78</sup> *Ibid.*

<sup>79</sup> Chiung, W.T. 2000. *Peh-oe-ji, Childish Writing*. Paper presented at the 6th Annual North American Taiwan Studies Conference, Harvard University, June 16-19, p. 5.

characters (漢字). Koa-a-chheh (song books) was also written in Han characters but dialectal characters, which were popular among common people, were incorporated as well. Besides, the grammatical structure of Koa-a-chheh was considered closer to colloquial speech, which was different from that of classical Han.<sup>80</sup>

After the Treaty of Tientsin (天津條約) was signed between Qing and foreign countries, foreign missionaries were allowed to enter the Qing-controlled Taiwan. Before their arrival, these missionaries had started developing Romanization of Hoklo and Hakka in Southeast China. In Taiwan, that Romanization was called Peh-oe-ji, which meant the script of vernacular speech. Due to people's preference towards Han characters, Peh-oe-ji was not widespread despite promotions from missionaries such as Reverend Thomas Barclay. However, Peh-oe-ji still paved the way for modern Romanization of Hoklo colloquial writing.<sup>81</sup>

Between 1895 and 1945, Japanese writing became the official written language. From 1945 to present, the characters of Mandarin Chinese replaced the official status of Japanese writing because of the strong intervention of the ROC government. Furthermore, in the 1920s, a movement intended to replace the writing of classical Han (文言) with colloquial writing (白話文) was launched, and thus led to the appearance of the New Literature (新文學), which generally adopted the colloquial speeches of Japanese, Mandarin, and local language varieties. However, Han characters were still dominant despite the success of the colloquial writing movement. Only a limited number of people promoted Romanization systems in creating new literatures. From 1980s onward, people in Taiwan were gradually aware that their mother tongues, except Mandarin, were dying; as a result, the promotion of mother tongue education gained momentum. Scholars have tried to design standardized

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<sup>80</sup> Chiung, W. T. 1999. *Language Attitudes toward Taibun -The Written Taiwanese*. Master's thesis, University of Texas at Arlington, pp. 25-27.

<sup>81</sup> *Ibid.*: 27-30.

writing systems for their mother tongues.

Today, there is no denying that Han characters are still dominant. Nevertheless, thanks to the relentless efforts of mother tongue promotion from scholars and those concerned about the issue, Romanization systems of Hoklo, Hakka, and aboriginal languages are now gradually being accepted and used though there is still a long way to go.





## **CHAPTER FOUR**

### **VALUE ASSESSMENT ON LANGUAGE VARIETIES**

Different language varieties contain different degrees of economic value. Those language varieties with higher economic value undoubtedly contain higher competitiveness, and thus their chances of survival are higher. Moreover, according to rational choice theory, individuals or institutions make choices or take actions that maximize their benefits; in other words, people tend to learn and use the language variety with high economic value.

As a consequence, to understand the transformation of language structure, we must find out what motivates people to use or abandon a certain language variety. That is, we need to analyze the economic value of each language variety within a specific context so as to comprehend their sustainability and competitiveness.

#### **4.1 Value Assessment on Language Varieties**

This section takes advantage of Baudrillard's value system (functional, exchange, symbolic, and sign values) to assess the economic value of the language varieties in Taiwan during martial law period.

##### **4.1.1 Functional Value of Language Varieties**

In the past sixty years, the industrial structure of Taiwan has experienced dramatic transformation. Such a significant advancement from primary industry to secondary and eventually to tertiary industry in Taiwan would have encountered a great obstacle if western growth model, which had helped industrialize many economic powers of today, were not adopted. Judging from the result, Taiwan has successfully, though not without difficulties, applied the characteristic features of the

western model to its own development. In other words, industrialization of Taiwan during martial law period was somewhat similar to westernization.

However, the emulation of the western model would turn out to be a failure if there is no language capable of absorbing, digesting, and conveying western knowledge. Most of the languages of the developing countries, including Hoklo, Hakka, and aboriginal language varieties of Taiwan during martial law period, did not possess much economic value from this perspective since they were unable to produce western or scientific terms. The falling behind of economy of the Third World countries could be partly attributed to the underdevelopment of their languages that are not only unable to enhance national cohesion but also incompetent to demonstrate necessary variations of modern society. These underdeveloped languages pale in comparison to western common languages in terms of modernization. As a result, linguistic westernization would become an indispensable precondition for economic development.

To achieve linguistic westernization, at least three conditions should be fulfilled: (1) the existence of writing system, which transmits knowledge more effectively and efficiently through writing materials; (2) strict standardization, which establishes a cross-border and cross-ethnic norm that transcends social variations; (3) interchangeability with western advanced concept so as to explicitly introduce technical and scientific skills needed for industrial upgrade.

Table 4-1 is a general assessment on Mandarin and local languages of Taiwan based on the above-mentioned criteria.

**Table 4-1: Assessment on Mandarin and Local Language Varieties during Martial Law Period**

	Mandarin	Local Language Varieties
Writing System	A long tradition of writing	Not widely accepted

	system	Romanization
Standardization	Highly standardized Formal codification	Not standardized Lack of established spelling rules
Interchangeability	Adapted to western scientific concepts since Qing dynasty	Relatively closed language systems

Judging from Table 4-1, Mandarin was more eligible and prepared for westernization; therefore, it was more conducive to the process of industrialization than all the other local language varieties of Taiwan. The functional value of Mandarin for economic purposes was thus higher.

**Figure 4-1: Relationship between Linguistic Westernization and Economic Development**

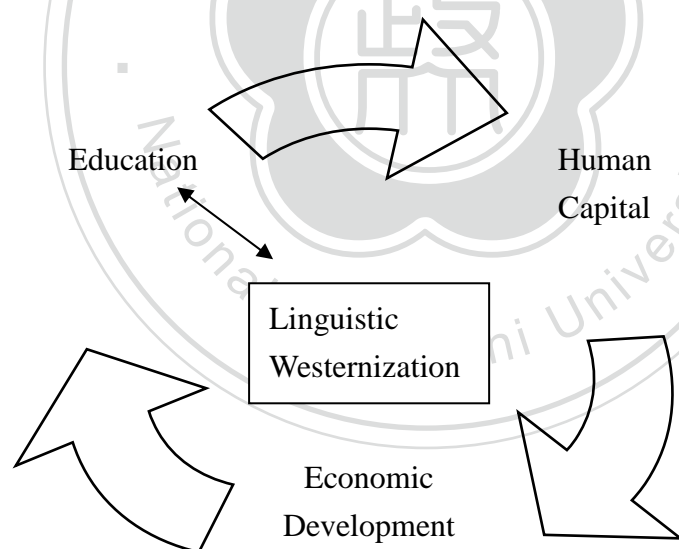


Figure 4-1 demonstrates the relationship between linguistic westernization and economic development. The role that language plays in enhancing economy lies within its cultivation of human capital through education, which needs an appropriate means of conveying knowledge. To this end, Mandarin served the function of

introducing western knowledge quite well because it had been developed for such purpose since late Qing dynasty. On the other hand, Hoklo, Hakka, and aboriginal languages remained underdeveloped until recently.

As far as Hoklo is concerned, it had been seriously undermined since Japanese period; thereafter Hoklo had solely functioned as a colloquial language variety that dealt with daily affairs, and, to make matters worse, Hoklo vocabulary about everyday life decreased and portions of it had been replaced by Mandarin and Japanese. The phenomenon of code-mixing was not uncommon, particularly when new western concepts were discussed. In other words, the more new ideas and things were dealt with, the more Mandarin was used. Hence, Hoklo, not to mention Hakka and aboriginal languages, was dwarfed by Mandarin in public spheres and traces of Mandarin influence were also conspicuous in private domains.<sup>82</sup>

Thus, the functional value of Mandarin was seemingly higher at least during martial law period. Nevertheless, the aforementioned analysis alone could not sufficiently explain the functional value of the different language varieties in Taiwan.

**Table 4-2: Assessment on Mandarin, Hoklo, and Hakka in the 1950s**

	Mandarin	Hoklo	Hakka
Number of Speakers	Quite Limited	Most	Fewer
Communicative Usefulness	Quite Limited	Best	Better
Easiness of Acquisition	Difficult	Easiest	Easier

Table 4-2 shows another functional value assessment on Mandarin, Hoklo, and Hakka based on different criteria. In terms of communicative usefulness, Mandarin was by no means advantageous during the initial years when the ROC government arrived in Taiwan. Hoklo, followed by Hakka, was by far the most prevalent spoken

<sup>82</sup> Hsiau, A-chin. 2000. *Contemporary Taiwanese Cultural Nationalism*. London: Routledge, p. 131.

language variety in Taiwan at that time. In terms of easiness of acquisition, Hoklo was supposed to be the easiest language variety to acquire since the majority of the Taiwanese population spoke Hoklo so that a Hoklo-friendly environment was provided. In other words, Hoklo might not be inferior to Mandarin purely based on functional value. The ROC government could have chosen Hoklo, or even Hakka that also possessed more speakers than Mandarin did, as the medium for instrumental purpose, and created a Hoklo writing system, standardized as well as adapted it for westernization since it would be easier and more cost-effective to do the linguistic adaptation than to force the people to learn a completely unknown language variety.

As a consequence, more assessments should be taken into account in order to figure out the true value of each language variety of Taiwan.

#### **4.1.2 Exchange Value of Language Varieties**

A number of researches have concluded that language ability was one of the keys for upward mobility and occupational achievement, especially during martial law period when only the use of Mandarin was allowed. Therefore, not all of the language varieties were equally effective in promoting the socioeconomic status of each individual. During martial law period, only Mandarin, compared with the other local language varieties of Taiwan, was effective in this regard.

After years of harsh Mandarin-only policy since the ROC government relocated to Taiwan, Mandarin had acquired a solid market value. The more fluent Mandarin one spoke, the higher occupational accomplishment one could achieve. Besides, there was a clear stratification between professions that required proficient Mandarin and professions that required local language varieties. To be more specifically, the labor market that demanded Hoklo was usually worse than that demanded Mandarin in terms of social prestige and income. Hakka and aboriginal language speakers usually

had to learn Mandarin or Hoklo in order to get a job since Hakka and aboriginal languages were not widely spoken and thus unable to form a linguistic and economic enclave.

In a multilingual immigrant society, language use reflects not only the speakers' background but also their ethnic identification and socioeconomic status. The inhabitants of Taiwan in the past century had experienced two drastic changes of official languages. The Japanese and ROC governments implemented the monolingual language policy through the control of political and economic resources, and gradually, Japanese and Mandarin created and strengthened a special power relations and social hierarchy among different ethnic groups in the labor market. Tsai proposed that Mandarin skill had been an important linguistic capital that facilitated the attainment of better occupational status, and the distribution of linguistic capital had been a reflection of an unequal society. From a micro perspective, language ability in a multilingual society is the key to better education and upward social mobility. However, different language varieties contain different linguistic capital. It is the language of the dominant class that represents the most generalized value. Thus, during martial period, standard Mandarin benefited those who spoke standard Mandarin.<sup>83</sup>

The following Table 4-3 shows the relationship among language, labor market, and occupational achievement:

**Table 4-3: Relationship among Language, Labor Market, and Occupational Achievement**

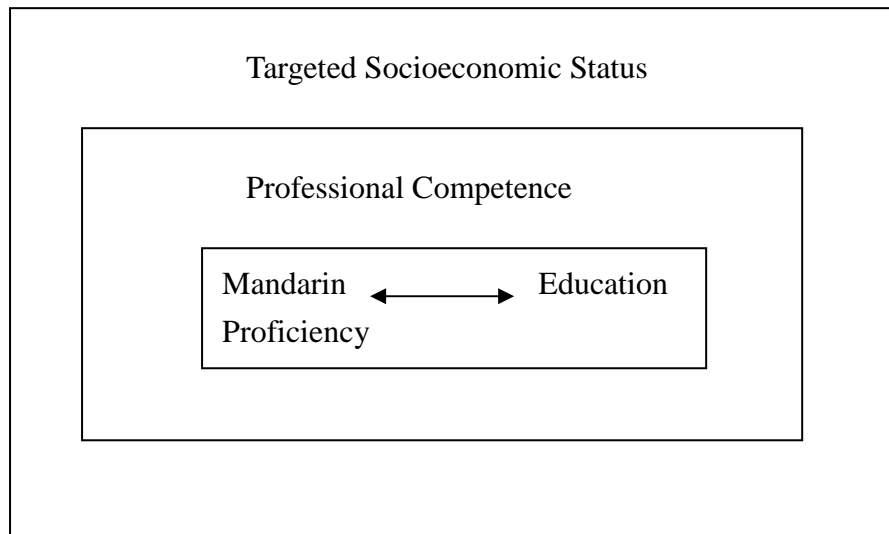
	Mandarin	Local Language Varieties
Labor Market	Good	Bad

<sup>83</sup>蔡淑玲，2001，「語言使用與職業階層化的關係：比較台灣男性的族群差異」，台灣社會學第一期，頁 65-111。

Occupational Achievement	Highly Related	Not Related
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Besides, Mandarin was purposefully designated as the language for instruction at each level of education during martial law period; as a result, good Mandarin skill was indispensable for those who wanted to receive higher education. And it had been proven that education was one of the deciding factors for obtaining better socioeconomic status. In fact, Mandarin proficiency and education were intertwined: the higher education one received the more sophisticated Mandarin one was able to use. In a nutshell, Mandarin competence was one of the important criteria in deciding one's socioeconomic status. As the following Figure 4-2 exhibits, education, Mandarin proficiency, professional competence, and targeted socioeconomic status were in a concentric relationship. In other words, one had to learn Mandarin for education, which again highly relied on the westernized Mandarin with a standardized writing system for expression, so as to gain adequate professional competence that resulted in the targeted socioeconomic status. Hence, with higher exchange value, people were motivated to learn Mandarin.

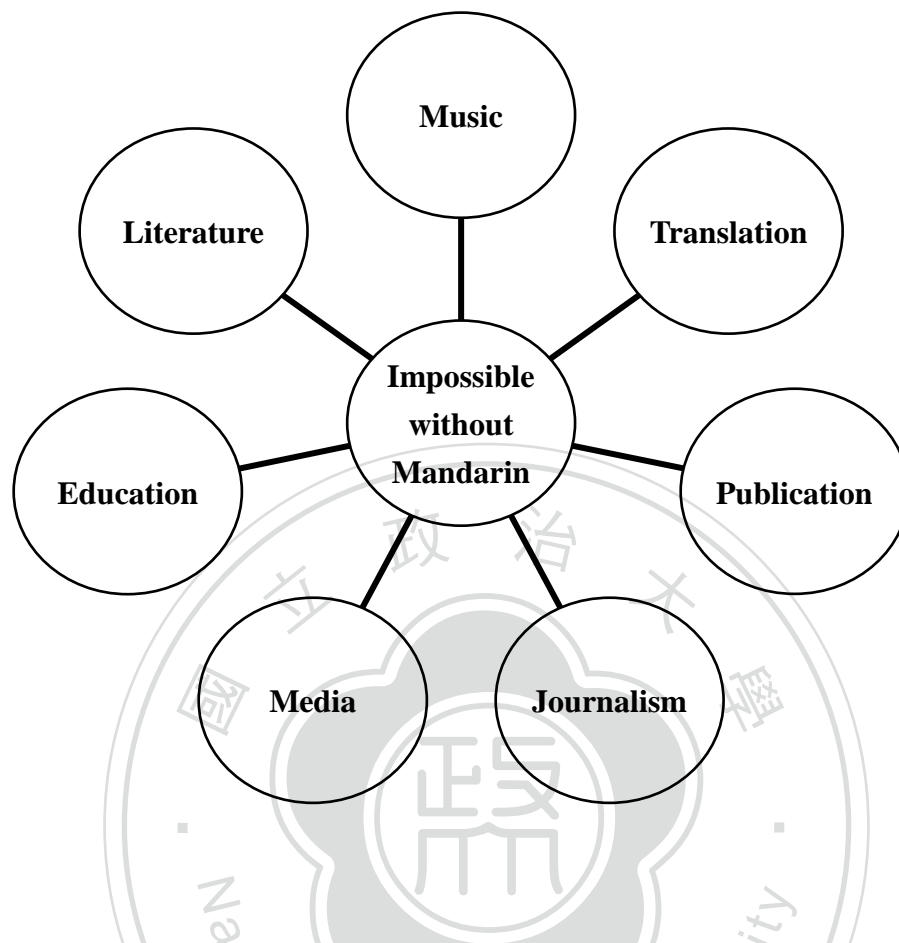
**Figure 4-2: Relationship among Mandarin Competence, Education, and Socioeconomic Competence**



Furthermore, there were a number of related job fields, as Figure 4-3 shows (part, not all of them are listed), that required Mandarin completely since it contained higher functional value and, above all, a standardized writing system.



**Figure 4-3: Fields not Possible without Mandarin**

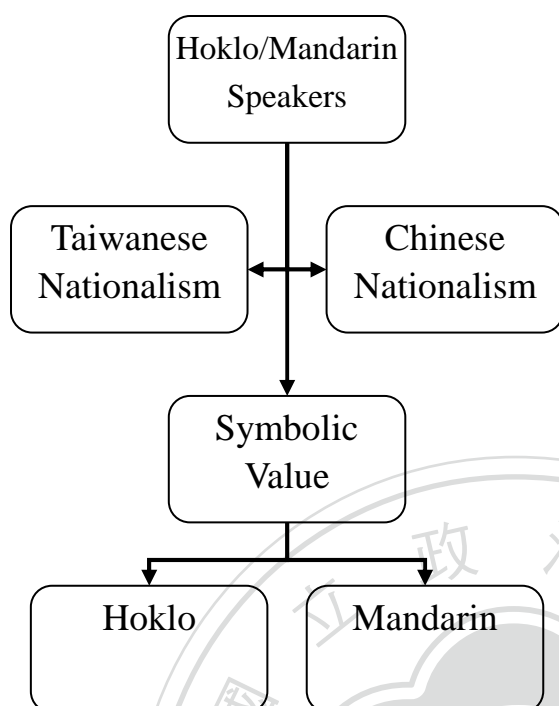


Consequently, people were inclined to learn Mandarin in exchange of better education, labor market, and socioeconomic status. That is, the exchange value of Mandarin was supposedly much higher than the other local language varieties, and thus people were naturally motivated to acquire Mandarin and even abandoned their own mother tongues.

#### **4.1.3 Symbolic Value of Language Varieties**

During martial law period, the most important symbolic value associated with language issues revolved around nationalism. Chinese nationalism, as promoted by the ROC government, was the focus of that period of history. Nevertheless, Taiwanese nationalism was intensified, though not initiated, by the ferocious ROC rule.

**Figure 4-4: Relationship among Speakers, Nationalism, Symbolic Value, and Language Variety**



As Figure 4-4 demonstrates, Hoklo and Mandarin speakers were influenced by Taiwanese nationalism and Chinese nationalism respectively; consequently, their representative language varieties, namely Hoklo and Mandarin, were given different symbolic value.<sup>84</sup>

Sinicization and de-Japanization of Taiwan was treated as an urgent task by the ROC government in an effort to legitimize its rule over the island as well as to transform the island into a base for recovering the Communist-controlled China. To create a history of pro-China view, the ROC government asserted that ethnically Hoklo, Hakka, and even aboriginal people, just like Mainlanders, were all Chinese; politically, the dominance of the ROC government in Taiwan was ideologically justified by a specific interpretation of Taiwan-China relations; culturally, the ROC

<sup>84</sup> Here I use the term representative language variety rather than mother tongue for the following reasons. As for Taiwanese nationalism, not only Hoklo speakers held the ideology but some Hakka and aboriginal language speakers also did, so Hoklo was merely representative since it was the majority. As for Chinese nationalism, the ROC government purposefully selected Mandarin to represent it despite the fact that Mandarin was initially spoken by a very limited number of people.

government argued that it was the resolute defender of traditional Chinese culture, Confucianism in particular.<sup>85</sup> As a result, the teaching of Mandarin was deemed an essential part in crafting the “imagined” China on Taiwan. That is, an important symbolic value that represented Chinese nationalism was intentionally formulated by the ROC government and given to Mandarin.

Nonetheless, while the ROC government was strictly imposing Chinese nationalism on Taiwan, the seed of Taiwanese nationalism and identity, which could be traced back to Japanese colonial period, was burgeoning at the same time. Despite the harsh Japanese rule, Taiwanese people still highly appreciated the upholding of law and order and the effective development of the island. Thus, the ROC government’s goal of crafting a common national identity between the islanders and the new arrivals was difficult to achieve. To make matters worse, the influx of the Mainlanders that later enjoyed many advantages further aggravated the relations between the natives and new-comers. Subsequently, a dangerous cleavage was formed between “Taiwanese” and “Mainlanders.”<sup>86</sup>

After the brutal February 28 Incident in 1947, a strong Taiwanese identity was roused and the anti-ROC Taiwanese people started developing a Taiwan-centered history and Taiwanese nationalism. Therefore, Taiwanese enthusiasm for Mandarin died down because of the ROC government’s bloody massacre and poor management of the island while the use of mother tongues, mostly Hoklo and Japanese, to vent emotions intensified. Thereafter, Hoklo was symbolic of Taiwanese nationalism.

In addition, the Taiwanese cultural identity that appeared in the Hsiang-t’u literature (鄉土文學) was worth mentioning. Hsiang-t’u literature, which described

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<sup>85</sup> Hsiau, A-chin. 2000. *Contemporary Taiwanese Cultural Nationalism*. London: Routledge, pp. 152-153.

<sup>86</sup> Hughes, Christopher. 2000. Post-nationalist Taiwan. In Michael Leifer (ed.). *Asian Nationalism*. London: Routledge, pp. 65-66.

lives of the common people in their native languages, sprouted in the 1930s during the Japanese period. After the ROC government took over Taiwan, Hsiang-t'u literature implied an opposition to the nostalgic works written by the newly arrived Mainlander authors that expressed strong anti-communist sentiments. During the 1970s when Taiwan encountered an enormous diplomatic crisis, Hsiang-t'u literature became a channel shared by all ethnic groups to vent the nationalist emotions. After the Formosan Incident, Hsiang-t'u literature was replaced by the term “Taiwanese literature (台灣文學).” Table 4-4 shows the development of Hsiang-t'u literature.<sup>87</sup>

**Table 4-4: Development of Hsiang-t'u Literature**

1945~1949	Empty—blossoming
1950~1959	Anti-communist (formation of Hsiang-t'u and western literature)
1960~1970	Western literature (growth of Hsiang-t'u literature)
1970~1979	Heyday of Hsiang-t'u literature (and continuing)

Furthermore, by granting official status to one language as opposed to another, language policies assign more symbolic value to one language variety as opposed to another; hence, those who master the official language are enabled to cash in their linguistic capital in the economic and political spheres.<sup>88</sup>

During martial law period, Hoklo and Mandarin were by no means on an equal footing. Owing to the disastrous language policy implemented by the ROC government, Mandarin was the only language variety that received government support for the promotion of Chinese nationalism. The use of local language varieties, including Hoklo, was severely suppressed. Besides, according to a 1987 island-wide

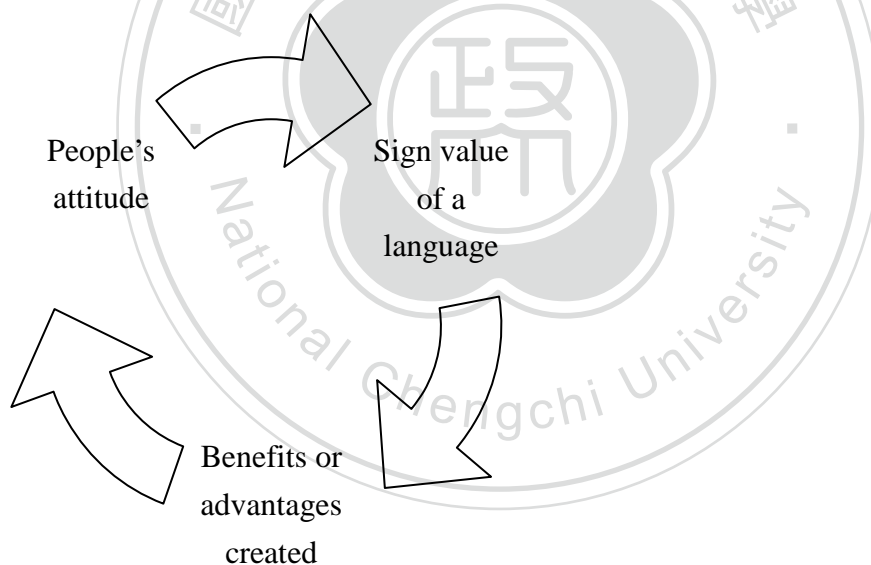
<sup>87</sup> Chang, Wen-chih. 1994. Taiwanese Identity in Contemporary Literature. In Chung-min Chen, Ying-chang Chuang, and Shu-min Huang (ed.): *Ethnicity in Taiwan: Social, Historical, and Cultural Perspectives*. Taipei: Institute of Ethnology, Academia Sinica, pp. 174-176.

<sup>88</sup> Friedman, P. Kerim. 2005. *Learning “Local” Languages: Passive Revolution, Language Markets, and Aborigine Education in Taiwan*. Ph.D. dissertation, Temple University, p. 254.

survey, more than half of Taiwanese college graduates used Mandarin at home and identified themselves with China, which was nearly twice the proportion of less-educated Taiwanese.<sup>89</sup> In other words, Chinese nationalism with all-inclusive government support overwhelmed other ideologies. As a consequence, the symbolic value of Mandarin that represented Chinese nationalism was stronger than that of Hoklo that represented Taiwanese nationalism.

#### 4.1.4 Sign Value of Language Varieties

**Figure 4-5: Mutual Influences among People's Attitude, Sign Value of a Language Variety, and the Benefits or Advantages Created by the Language Variety**



As Figure 4-5 shows, the sign value of a certain language variety is largely determined by people's attitude towards it; however, people's attitude is mostly influenced by what kind of benefits or advantages the said language variety is able to create.

<sup>89</sup> Hsiao, A-chin. 2000. *Contemporary Taiwanese Cultural Nationalism*. London: Routledge, p. 131.

**Table 4-5: Attitudes towards Languages among Different Ethnic Groups<sup>90</sup>**

	Hoklo	Hakka	Mainlander	Aboriginal	Total
Mandarin	7.31	7.90	8.36	7.76	7.53
Hoklo	7.66	6.91	7.19	6.28	7.48
Hakka	5.15	7.41	5.84	5.65	5.60
Total	6.71	7.41	7.13	6.56	

In this survey (see Table 4-5), examinees were asked to grade each language variety according to the degree of elegance. A ten-point scale was used with ten points being the most elegant. Although this survey was not conducted during martial law period, it could be regarded as the accumulated result. In other words, the language attitude situation during martial law period more or less conformed to this survey.

From table 4-5, we could suggest that Mandarin (7.53), followed by Hoklo (7.48) and Hakka (5.60), was considered the most elegant language in general. However, it was worth our attention that Hoklo people considered their mother tongue more elegant than Mandarin while Hakka people did not. Besides, there was no significant difference between Mandarin (7.53) and Hoklo (7.48).<sup>91</sup>

**Table 4-6: Music Preferences in Taipei, Taichung, and Kaohsiung<sup>92</sup> Unit: %**

Type of music	Taipei	Taichung	Kaohsiung	Total
Mandarin pop	74.3	66.0	60.4	66.9
Western pop	35.6	33.0	34.7	34.4
Hoklo pop	1.0	10.0	4.0	5.0

<sup>90</sup>何萬順，2008，” 語言與族群認同：台灣外省族群的母語與台灣華語”，發表於第一屆兩岸四地語言學論壇，澳門：澳門理工學院，2008 年 12 月。第 21 頁。

<sup>91</sup> *Ibid.*

<sup>92</sup>張容瑛、周志龍，2004，” 台灣流行音樂產業網絡群聚與創作氛圍”，發表於文化研究學會 2003 年會，台北：東吳大學，2004 年 1 月。第 19 頁。

Japanese pop	5.9	4.0	3.0	4.3
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(A multi-select questionnaire, so the total is not 100%.)

In Table 4-6, people were asked which type of music they prefer. It was quite obvious that Mandarin music embraced most of the attention while Hoklo music shared no more than ten percent. Hakka and aboriginal pop music were undoubtedly out of the mainstream and thus were rare in the market. Though Hakka and aboriginal music have been gaining public attention due to both governmental and private promotions since 2000 in particular, they are still far behind Mandarin and Hoklo music up to the present. Again, this survey was not conducted during martial law period but it was still representative of the situation years back.

**Table 4-7: A Comparison of Diglossic Features between Mandarin and Local Language Varieties**

Language Varieties Features	Mandarin	Local Language Varieties
1. Function	Used in both formal and informal situations	Used mostly in informal situations
2. Literary Heritage	A sizable body of written literature held in high esteem	Relatively Fewer traditional literary work and was suppressed
3. Acquisition	Acquired through formal education	Acquired through “normal,” “natural,” and informal ways
4. Standardization	Established norm for pronunciation, grammar, and vocabulary	No settled orthography, and wide variation in pronunciation
5. Stability	Lasted for centuries, and seldom borrowed words from low variety	Relatively uncoded and unstable, and repeated borrowing of vocabulary items from high variety,

		namely Japanese and Mandarin
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In Table 4-7, I apply some features of diglossia to analyze Mandarin and local language varieties. From this table, Mandarin in the listed five dimensions is superior (this situation held true at least during the martial law period); that is, a stratification in languages has been formed.

Judging from Table 4-5, 4-6, and 4-7, it is reasonable to assume that people in Taiwan used to hold very positive attitude towards Mandarin and the social and economic power of the Mandarin speakers were recognized. Therefore, Mandarin unquestionably possessed higher sign value than the other local language varieties did. To put it differently, Mandarin speakers used to be considered well-educated and associated with social and economic success while Hoklo speakers were thought to be marked by backwardness, illiteracy, and low socioeconomic status.

**Table 4-8: Classes of Languages in Taiwan<sup>93</sup>**

Westernized Mandarin (H 1)
Mandarin (H 2)
Local Language Varieties (M)
Taiwan Guoyu (L)

Furthermore, according to Table 4-8, the language varieties in Taiwan have been stratified as follows: westernized Mandarin, Mandarin, local language varieties, and Taiwan Guoyu. Westernized Mandarin refers to Mandarin-speaking mixed with foreign language words or phrases as commonly used by some intellectuals and public

<sup>93</sup> Wu, Chang Neng. 2007. *The Taigi literature debates and related developments (1987-1996)*. Master's thesis, National Chengchi University, p. 17.



celebrities. Briefly speaking, Mandarin, which has been used in congress, school, and mass media, has been regarded or intentionally designated as the high language since the relocation of the ROC government to Taiwan. On the contrary, local language varieties such as Hoklo, Hakka, and aboriginal languages have all been considered low languages, which have been frequently used in informal situations like family and private meetings.

Although hardly known in Taiwan, Mandarin for a number of political and economic reasons was selected by the ROC government to become the high language. Many researches have proved that Taiwanese society has become highly diglossic, and Mandarin has always undoubtedly been on top of the linguistic pyramid.

To sum up, based on Table 4-5, 4-6, and 4-7, people in Taiwan have thought highly of Mandarin. This means a better stereotype and higher social prestige have been given to Mandarin and its speakers. In reality, Mandarin has also been beneficial to its speakers in pursuit of socioeconomic success. As a result, the sign value of Mandarin has always been much higher than all the other local language varieties.

## 4.2 A Brief Conclusion of Section 4.1

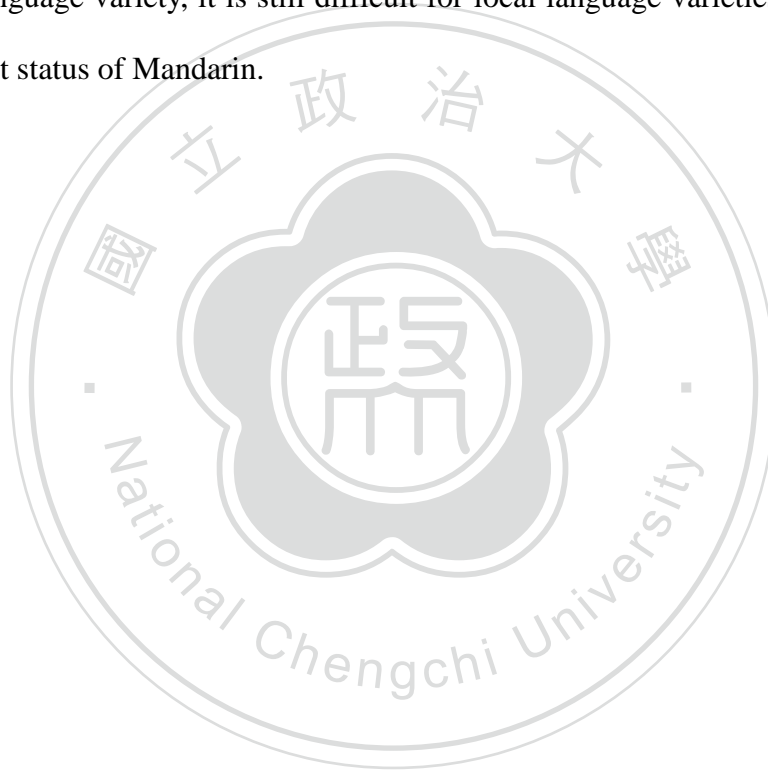
**Table 4-9: Comparison of Language Value during Martial Law Period**

	Mandarin	Local Language Varieties
Functional Value	High	Low
Exchange Value	High	Low
Symbolic Value	High	Low
Sign Value	High	Low

As we can see from Table 4-9, the functional, exchange, symbolic, and sign values of Mandarin had been higher than those of the local language varieties.

Therefore, not only did the ROC government choose Mandarin as the national and official language, but the common people also clung to Mandarin gradually in order to enhance their socioeconomic competence and status.

Consequently, the language structure of Taiwan little by little became imbalanced. Now Mandarin has gained a dominant status while local language varieties are disappearing. What's worse, the aboriginal languages are on the brink of extinction. Though lots of promotions and policies have been proposed to bring an equal status to every language variety, it is still difficult for local language varieties to challenge the dominant status of Mandarin.



## **CHPATER FIVE**

### **THE IMPACT OF ECONOMIC DEVELOPMENT ON LANGUAGE STRUCTURE**

This chapter analyzes the relationship between economic development and the transformation of language structure of Taiwan during martial law period. The structural change in economy led to the formation of five social classes that were characterized by the use of different language varieties. To enter the higher class, members of the lower class had to learn Mandarin, receive more education, and participate in certain examinations. Thus, upward social mobility coupled with the education and examination systems that required proficient Mandarin ability brought about the prevalence of Mandarin.

Besides, through a comparison of the Japan-led and ROC-led island-wide language directives, this chapter further proves that economic factors are important in the popularization of Mandarin.

#### **5.1 Economic Development of Taiwan during Martial Law Period**

This section briefly deals with the economic development and structural change in economy between 1950s and 1980s.

##### **5.1.1 A Brief Account of the Economic Development between 1950s and 1980s<sup>94</sup>**

In the 1950s, economic stabilization and food production was the priority. Measures were taken to help increase agricultural production so as to provide the raw materials required by the agricultural products processing industry. At the same time,

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<sup>94</sup> Council for Economic Planning and Development (CEPD), *Economic Development R.O.C. (Taiwan)*, 2008, pp. 8-9.

a period of import substitution based on labor-intensive light industries was initiated in an effort to lessen dependence on imports and the need for foreign exchange. The small-and-medium-sized enterprises (SMEs), which aimed at domestic market, started to develop, and over 90% of enterprises in Taiwan were composed of ten or fewer employees.

In the 1960s, the government focused on promoting labor-intensive and export-oriented industries to take advantage of low-cost labor and tap Taiwan's potential in developing export market. To achieve that goal, reforms in foreign exchange administration and taxation were introduced, the Statute for the Encouragement of Investment was enacted and Taiwan's first export processing zone was established in 1996. Hence, increased rapidly were Taiwan's exports, which became the locomotive of the fast-growing economy. During this period, the development of large enterprises stimulated the growth of SMEs that produced components for the larger firms.

By the end of the 1960s, with strong domestic demand for machinery, equipment, and intermediate materials and a substantial improvement in the production structure on the other, the government encouraged a gradual shift to basic and heavy industries. This was accomplished by promoting the production of domestic substitutes for imported intermediates and the development of capital-intensive industries. Taiwan's SMEs successfully went through the oil crises happened during the 1970s, and their importance in terms of production value and employment grew significantly.

In the 1980s, the benefits of trade-promotion policies and an increasing surplus in foreign trade started to bring positive effects to the economy. Economic liberalization and internationalization became new guiding principles for Taiwan's further development. Meanwhile, Taiwan began to take advantage of its ample capital resources to develop capital- and technology-intensive industries. The importance of

SMEs to the economy continued to increase.

### 5.1.2 Structural Change in Economy

**Table 5-1: Shares of Employment by Industry, 1952-1987 (%)**<sup>95</sup>

Year	Industry			Total
	Primary <sup>96</sup>	Secondary <sup>97</sup>	Tertiary <sup>98</sup>	
1952	56.1	16.9	27.0	100.0
1955	53.6	18.0	28.3	100.0
1960	50.2	20.5	29.3	100.0
1965	46.5	22.3	31.3	100.0
1970	36.7	28.0	35.3	100.0
1975	30.4	34.9	34.6	100.0
1980	19.5	42.4	38.1	100.0
1982	18.9	41.3	39.8	100.0
1985	17.5	41.6	41.0	100.0
1987	15.3	42.8	42.0	100.0

As Table 5-1 shows, the economic structure of Taiwan had experienced a tremendous transformation during the martial law period. The primary industry's share of total employment decreased sharply from 56.1% in 1952 to 15.3% in 1987. In the meantime, secondary industry's share of total employment rose from 16.9% in

<sup>95</sup> Council for Economic Planning and Development (CEPD), *Taiwan Statistical Data Book*, 2009, p. 35.

<sup>96</sup> Primary industry includes agriculture, forestry, fishery, and poultry and livestock raising, etc.

<sup>97</sup> Secondary industry refers to mining and quarrying, manufacturing, electricity, gas and water, and construction, etc.

<sup>98</sup> Tertiary industry includes services such as commerce, transportation, communication, finance, insurance, real estate, social, and personal services, etc.

1952 to 42.8% in 1987, and that of tertiary industry from 27.0% to 42.0%. The increase in secondary industry's share of employment mainly resulted from the growth of the manufacturing sector, which was (still is) the most important subsector of secondary industry, and its significant contribution to employment was well-known. To create more employment opportunities in the 1960s, the government successfully transformed the economy into labor-intensive and export-oriented, which helped absorb 42.8% of employment by the end of 1987. Meanwhile, the growth of service sector, which created not only employment opportunities for new workers but also re-employment channels for displaced workers, was stimulated by the rapid industrialization.

**Table 5-2: Gross Domestic Product by Industry, 1952-1987 (%)**<sup>99</sup>

Year	Agriculture	Industry (Manufacturing)	Services	Total
1952	32.2	19.7 (12.9)	48.1	100.0
1955	29.1	23.2 (15.6)	47.7	100.0
1960	28.5	26.9 (19.1)	44.6	100.0
1965	23.6	30.2 (22.3)	46.2	100.0
1970	15.5	36.8 (29.2)	47.7	100.0
1975	12.7	39.9 (30.9)	47.4	100.0
1980	7.7	45.7 (36.0)	46.6	100.0
1982	7.7	44.3 (35.2)	47.8	100.0
1985	5.8	46.3 (37.6)	47.9	100.0
1987	5.3	46.7 (38.9)	48.0	100.0

<sup>99</sup> Council for Economic Planning and Development (CEPD), *Taiwan Statistical Data Book*, 2003, p. 54.

According to Table 5-2, the agricultural sector played a very important role in boosting the economy before 1960s. The ROC government encouraged the agricultural production to meet the need for food. After the successful Green Revolution, a large number of labor forces were released from the primary industry and absorbed by the fast-growing secondary industry, especially the manufacturing sector. From 1960 to 1987, the pace of industrialization accelerated and industry became the engine of Taiwan's sustained and rapid economic growth. By 1987 industry's share of GDP had risen to 46.7%, while agriculture's had decreased to 5.3%.

## **5.2 Impact of Economic Development on Society and Language Structure**

This section discusses the formation of five social classes that resulted from the drastic economic development, the influence of social mobility on language use, and ethnic and linguistic dichotomy in economic organization.

### **5.2.1 Formation of the Five Social Classes**

The rapid industrialization and the structural change in economy during martial law period brought about a slow transition into a new five-class social structure which was defined by social class in terms of the mode of production, income and economic status rather than by ethnic group consciousness. Different economic opportunities resulted in different degrees of social mobility, and hence the formation of social classes. These five "social classes" were: the upper class, the traditional middle class, the new middle class, the lower class, and the lumpen proletariat consisting of the deviant and the unemployed. These five social classes were composed of members from different ethnolinguistic groups; that is, each class was in itself a mixture from

ethnolinguistic perspective.<sup>100</sup>

The upper class, by way of public and private enterprises, controlled the means of large-scale production as well as the legal and economic conditions under which its own and smaller businesses operated. The upper class could be further divided into two categories that corresponded to the ethnolinguistic groups: one was the elite government and military personnel who were mostly wealthy Mainlanders with political power, and the other was the giant industrial and commercial entrepreneurs that were mainly non-Mainlanders.<sup>101</sup>

Based on Gates' analysis, the middle class was composed of the traditional middle class and the new middle class. The traditional middle class, whose occupations were typically in owner-operated farms, commerce, and small industry, constituted a petty bourgeoisie that possessed and tried to expand capital. The new middle class, who did not own any means of production, was made up of salaried functionaries hired by the state and by large corporations that the state allowed to exist.<sup>102</sup>

The lower class sold its labor or combined the value of that labor with the capital of tiny enterprises or minimal farmlands to maintain a steady social position. The lower class was characterized by unstable incomes, low prestige, and seemingly no access to political power.<sup>103</sup>

The fifth class, the lumpen proletariat, consisted of the chronically unemployed and criminals, prostitutes, etc., who were classified as unproductive and parasitical.<sup>104</sup>

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<sup>100</sup> Feifel, Karl-Eugen. 1994. *Language Attitudes in Taiwan - A Social Evaluation of Language in Social Change*. Taipei: The Crane Publishing Co., Ltd, pp. 36-37.

<sup>101</sup> Gates, Hill. 1981. Ethnicity and Social Class. In Emily Martin Ahern and Hill Gates (ed.). *The Anthropology of Taiwanese Society*. Taipei: Caves Books, Ltd, pp. 273-279.

<sup>102</sup> *Ibid.*

<sup>103</sup> *Ibid.*

<sup>104</sup> *Ibid.*



### 5.2.2 Influence of Social Mobility on Language Use

It is reasonable to assume that most people desire to maintain or better their social class. In other words, members of the lower class and the lumpen proletariat naturally would have a hankering to enter the middle class and, ultimately, the upper class, which is quite unattainable. Most upward social mobility involves movement into or through the middle class.

Members of the lower class strongly clung to Hoklo that represented their identity. But those who desired upward mobility would use Mandarin in the work sphere. The majority of this group still held the attitude that Hoklo was the only appropriate language variety for consulting deities and worshipping ancestors.<sup>105</sup>

The upper class Hoklo people, who lived in an environment that never forced them to acquire Mandarin, were bilingual in Hoklo and Japanese. However, the next generation of this group had to acquire Mandarin to receive education. They functioned in their own circles in Hoklo, and thus possessed a relaxed attitude towards Mandarin. But if they moved down into the new middle class, their need for Mandarin would increase. The upper class Mainlanders, who oriented on political and military control, regarded Mandarin as a symbol of national unity, a representation of their identity, and a channel to success. Consequently, the majority of the upper class Mainlanders during martial law period was Mandarin monolinguals.<sup>106</sup>

Members of the traditional middle class also identified themselves with Hoklo, but some of them, whose function as traders forced them to adjust to different social contexts, were also proficient in Japanese and Mandarin.<sup>107</sup>

According to Van den Berg, the new middle class were further divided into three

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<sup>105</sup> Van den Berg, Marinus E. 1988. Taiwan's Sociolinguistic Setting. In Robert L. Cheng and Shuan-fan Huang (ed.). *The Structure of Taiwanese: A Modern Synthesis*. Taipei: Crane Publishing Co., Ltd, p. 249.

<sup>106</sup> *Ibid.*: p. 250.

<sup>107</sup> *Ibid.*: p. 249.

sections. The lower section of this group valued their tongues so that Hoklo was dominant at home, but Mandarin was needed for conversations with their children and for those who worked in the service industry. In the middle section, a tendency to use Mandarin with their children had developed, and a majority of interactions within these families was conducted in Mandarin. The generation of the upper section that grew up after 1945 were bilingual in Hoklo and Mandarin, but Mandarin was the appropriate language variety for formal settings and dominant at home. Mainlanders that belonged to the new middle class were well aware of the advantages that Mandarin had brought them, so they stuck to Mandarin though various degrees of proficiency in Hoklo variety were acquired through peer group contacts.<sup>108</sup>

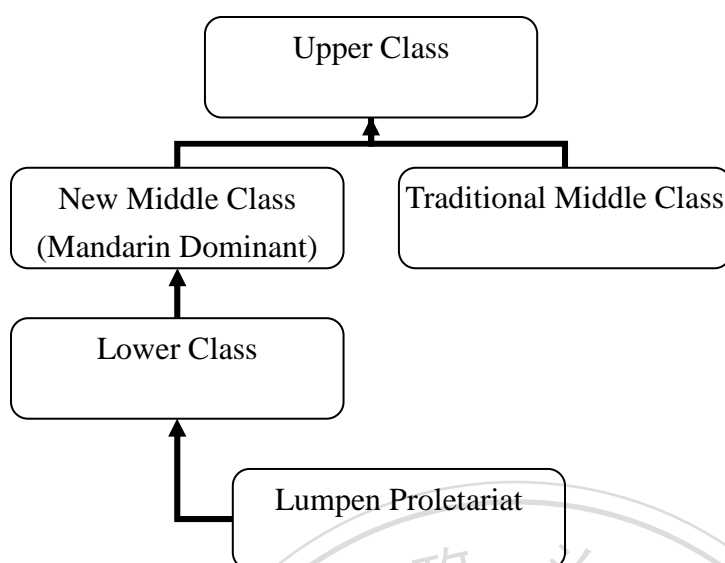
In some respects the new middle class could be regarded as the essence of the new Taiwanese society. It represented modernity, social status, competence, education, high income, economic development, and an anticipation of an even better future. This new middle class exhibited rapid growth, and gaining status by way of education to enter the new middle class was always a major goal of the socially upwardly people in Taiwan and lower-class members. For those who eagerly sought opportunities for upward mobility in the new middle class, standard Mandarin was the dominant language. Most of the members of this class worked or lived in the environment that required Mandarin. These people were career-oriented, and thus Mandarin-oriented.<sup>109</sup>

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<sup>108</sup> Ibid.: p. 250.

<sup>109</sup> Feifel, Karl-Eugen. 1994. *Language Attitudes in Taiwan - A Social Evaluation of Language in Social Change*. Taipei: The Crane Publishing Co., Ltd, p. 39.

**Figure 5-1: The Five Social Classes and Upward Social Mobility**



As Figure 5-1 shows, people of the low class, if not all, naturally tried to enter the new middle class (not the traditional middle class since it refers to those that already possessed some assets). However, since this class was Mandarin dominant, members of the low class had to either abandon their mother tongue or become bilingual in Mandarin and their mother tongue. Thus, social mobility exerted great influence on the use of Mandarin.

Parents of the new middle class encouraged their children to learn Mandarin at an early age, so as not to be disadvantaged in school and future employment. This even went so far as to cause many local parents to speak exclusively in Mandarin to their children, who thus became monolingual in Mandarin and lost the ability to comprehend their mother tongues used by the older generations.

All in all, to climb the social class ladder, proficiency in Mandarin was indispensable. And thus Mandarin gradually dominated the speaking practices in Taiwan.

### 5.2.3 Ethnic and Linguistic Dichotomy in Economic Organization

Researches have revealed a somewhat dichotomized mobility track for the Mainlanders and non-Mainlanders. During martial law period Mainlanders were inclined to climb the public sector societal ladder while the non-Mainlanders were prone to embrace private occupations.

Non-Mandarin language varieties were suppressed in the public sector. For the military part, men over the age of 18 in Taiwan were required to do a compulsory military service, and the military strictly prohibited the use of non-Mandarin language varieties. They even encouraged young men to take Mandarin courses before enrolling. In addition, proficiency in Mandarin was a mandatory condition for government positions shortly after retrocession, and this helped Mandarin become hegemonic in government. In 1965, owing to ROC's policies, Mandarin was the only language variety that civil servants were to speak during office hours, and the court of law adopted Mandarin to conduct the procedures. In the early 1980's, efforts were made to prohibit any language variety but Mandarin in meetings, official business, public speeches, and conversations that occurred in public.<sup>110</sup>

These measures made by the ROC government aimed in part to restore the Chinese nationalism and in part to secure the positions for the sudden influx of Mainlanders. The result is that during martial law period the Mainlanders were highly concentrated in the public sector with Mandarin being the dominant language variety. For those non-Mandarin speakers of the lower class, if they wanted to move upwardly, fluent Mandarin needed to be acquired.

Since the public sector was designed, to a certain degree, in favor of the Mainlanders, the non-Mainlanders turned towards the private sector for the reason

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<sup>110</sup> Brubaker, Brian Lee. 1995. *Language Attitudes and Identity in Taiwan*. Master's thesis, University of Pittsburgh, p. 27.

that the ROC government did not exert tight control over business activities, particularly international business. The rapid industrialization created many opportunities for the non-Mainlanders. The emergence of the small-and-medium sized enterprises (SMEs) was of special importance. SMEs were mostly run by non-Mainlanders, Hoklo people in particular. SMEs were mostly export-oriented, and they constituted the major force that propelled the growth of the economy. One specific characteristic of SMEs was the heavy reliance on kinship networks for capital and labor. As a result, it is natural that most daily businesses were conducted in their mother tongues, mostly Hoklo, despite the fact that a portion of them were bilingual in Mandarin and their mother tongues due to business contacts with Mandarin speakers and education. Non-Mainlander-owned firms were usually reluctant to hire the Mainlanders without specifying it so as to prevent potential penetration or even takeover by Mainlanders; moreover, they required job applicants to be able to use Hoklo, the prevailing business language.<sup>111</sup> The Mainlanders were short of the kind of social capital as possessed by the Hoklo people; consequently, they were put in a disadvantaged position in this regard and were excluded. Besides, the better wages and job security in the public sector enjoyed by the Mainlanders before the rapid growth of economy provided them with no incentive to enter the private sector.

**Table 5-3: Dominant Group and Language in Public and Private Sector during Martial Law Period**

	Public Sector	Private Sector (SMEs)
Dominant Group	Mainlander	Non-Mainlander
Dominant Language	Mandarin	Hoklo

<sup>111</sup> Shih, Cheng-Feng. 1996. *A Study of the Development of Taiwanese Consciousness: With a Focus on Linguistic and Historical Distinctions*. Paper presented at the 16th General Conference of the International Peace Research Association, Brisbane, July 8-12.

In summary, as Table 5-3 shows, the non-Mainlanders possessed the advantages of social capital in the private sector while the Mainlanders enjoyed similar advantages in the public sector. Hence, generally speaking, the private sector was Hoklo-dominant while the public sector was Mandarin-dominant. A clear ethnolinguistic line was thus drawn.

### 5.3 Education and Language Use

During martial law period, the economic structure of Taiwan dramatically transformed from primary to secondary and then to tertiary industry. This economic upgrade could not be achieved without abundant supply of quality human resources, particularly since Taiwan was short of natural resources. Thus, to boost the economy and facilitate the process of industrialization, the ROC government invested a lot in education in order to produce sufficient human capital. In addition, for members of the lower class that desired to gain upward social mobility, appropriate education equipped them with necessary skills so that they were able to respond to the fast-changing economy effectively, and good educational background was one of the characteristics of the new middle class.

Education played a key role in Taiwan's economic development and industrial upgrade. Since 1953, a series of economic development plans had been implemented by the government. Nevertheless, the plans for cultivating quality human capital were not introduced until the mid-1960s. Since then, almost all levels of educational policies, especially those related to vocational education, have been led by economic goals.<sup>112</sup>

Table 5-4 lists different stages of economic plans as well as the corresponding

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<sup>112</sup> Tien, Flora F. 1996. How Education Drove Taiwan's Economic Development. *Economic Reform Today*, 4: 13.

educational policies aimed at providing appropriate human capital for potential economic development.

**Table 5-4: Taiwan's Economic Plans and Manpower Plans over Four Decades of Economic Development<sup>113</sup>**

Economic Plan	Period	Principal goals of the education policies
Export Expansion	1965-68	Extend compulsory education from six to nine years; increase the number of industry-oriented vocational schools and five-year junior colleges.
	1969-72	Add more vocational schools and five-year junior colleges; set student ratio of 1:1 for vocational schools and high schools, with the goal of raising this ratio to 3:2 by 1977; set goal of attaining a ratio among graduates of vocational schools, junior colleges, and universities of 3:2:2 in 1972 and 2:2:1 in 1977.
Public Construction and Development of Private Sector	1973-76	Establish Taiwan Institute of Technology; limit the increase in the number of high schools; set student ratio goal of 7:3 for vocational schools and high schools to be achieved within ten years; set the university student ratio of 11:9 for science and technology departments as opposed to humanities and social science departments.
	1976-81	Set student ratio goal of 7:3 for vocational schools and high schools; improve faculty quality and curriculum design in vocational schools.
Economic Liberalization and Technology-Oriented Development	1980-89	Increase the number of graduate schools; limit the expansion of high schools; increase focus on engineering, agriculture, shipbuilding, and electronic information in industry-oriented junior colleges.
	1982-85	Extend compulsory education to 12 years for those following the vocational education track.

<sup>113</sup> *Ibid.*: 15.

	1986-89	Enhance educational quality; adjust high school education for both college preparation and vocational training; improve the quality of education for private vocational schools.
Towards Becoming an Asia-Pacific Operation Center	1990-93	Expand higher education; adjust curriculum in high schools and vocational schools to establish specialized high schools; establish technology-oriented four-year colleges.
	1991-96	Improve educational equality in different regions; develop programs focusing on service industries in vocational schools and colleges.

Due to the large-scale structural transformation in a relatively short period of time, the shortage of high-level manpower became more acute for Taiwan in pursuit of rapid economic growth. Taiwan's human resource problem was the shortage of highly trained scholars and scientists as well as the undersupply of university graduates in sciences, engineering, education, and medicine, etc. during martial law period.

Because of the drastic economic boom, lots of job opportunities emerged for the highly-educated. As a result, people in Taiwan were becoming more and more eager to pursue higher education. Thus, there had been a rapid expansion of education in Taiwan.

**Table 5-5: Number of Schools and Students**<sup>114</sup>

School Year	Number of Schools	Number of Students
1952-53	1,769	1,187,858
1960-61	2,911	2,365,260
1965-66	3,335	3,101,130
1970-71	3,979	3,969,150

<sup>114</sup> Council for Economic Planning and Development (CEPD), *Taiwan Statistical Data Book*, 2003, p. 275.



1974-75	4,344	4,370,876
1979-80	4,890	4,548,474
1981-82	5,184	4,622,209
1984-85	6,005	4,852,282
1986-87	6,432	5,028,059

According to Table 5-5, the number of students in school year 1952-53 was 1769, and the number rose by nearly six times to 6432 in school year 1986-87; the number of students in school year 1952-53 was 1187858, and then rose to 5028059 in school year 1986-87. Generally speaking, education in Taiwan had undergone a drastic expansion in terms of number of schools and students.

**Table 5-6: Number of Schools by Level of Education**<sup>115</sup>

School Year	Higher Education	Secondary Education	Primary Education
1952-53	8	214	1,251
1960-61	27	361	1,795
1965-66	56	546	2,114
1970-71	92	874	2,277
1974-75	100	957	2,312
1979-80	101	995	2,394
1981-82	104	1,021	2,417
1984-85	105	1,033	2,447
1986-87	105	1,042	2,461

Table 5-6 shows the number of schools by level of education. The number of schools in higher education rose from 8 in school year 1952-53 to 105 in school year 1986-87, while the number rose from 214 to 1042 in secondary education. The nearly two-fold increase in primary education from 1251 to 2461 was particularly important since this level of education was the most attainable to common people and thus it

<sup>115</sup> *Ibid.*: 276.

dramatically increased the enrollment of school age children.

**Table 5-7: Number of Students by Level of Education**<sup>116</sup>

School Year	Higher Education	Secondary Education	Primary Education
1952-53	10,037	139,388	1,003,304
1960-61	35,060	354,561	1,879,428
1965-66	85,346	661,961	2,243,503
1970-71	2 03,473	1,149,529	2,428,585
1974-75	2 82,168	1,426,077	2,390,645
1979-80	3 29,603	1,585,341	2,244,362
1981-82	3 58,437	1,620,165	2,202,904
1984-85	3 22,269	1,760,287	2,264,518
1986-87	3 45,736	1,780,962	2,356,304

According to Table 5-7, the increase in number of students in each level of education was astonishing. The number of students in higher education was augmented by approximately 30 times during school year 1952-53 to 1986-87; the number of students who received secondary education increased by around 5 times, while the number of students who received primary education nearly doubled.

As discussed in chapter 4, the functional value of Mandarin was much higher, so Mandarin was chosen as the language for instruction in all levels of school. Furthermore, all language varieties except Mandarin were treated as illegal languages and were thus suppressed in schools during martial law period. If students spoke local language varieties, they would be punished by the way of fines or public insults.

Based on Table 5-5, 5-6, and 5-7, it is reasonable to assume that those who were able to use Mandarin increased rapidly thanks to the expansion of education.

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<sup>116</sup> *Ibid.*: 279.

**Table 5-8: Percentage of Educational Attainment for People above Six in Taiwan in 1987<sup>117</sup>**

Elementary School	37.54%
Junior High	19.12%
Senior High	7.40%
Vocational School	16.17%
Junior College	5.15%
College	4.37%
Graduate School	0.22%
Self-study	1.65%
Illiterate	7.79%
Total	100%

Based on Table 5-8, a more realistic figure of fluent speakers of Mandarin could be revealed. People with middle school education or higher accounted for 52.43%. If we then add 37.54%, the percentage of people who received only elementary education or who were at that time enrolled in an elementary school, then the total went up to 89.97%, roughly 90% of the population aged 7 or above. In other words, it makes sense to estimate that for those over six years old in Taiwan in 1987, only roughly 10% of them were unable to use Mandarin.<sup>118</sup>

During martial law period, education served as a detrimental mechanism for legitimating ROC rule in Taiwan. Ideologically, education was an efficient channel for creating and transmitting symbolic values, and Mandarin was utilized to connect the collective memory of people in Taiwan with the greater Chinese image.

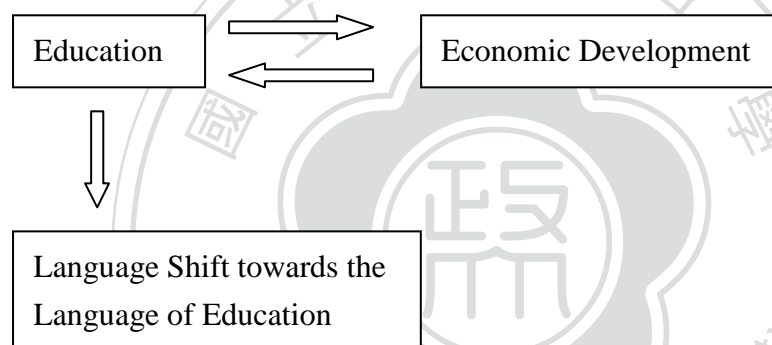
<sup>117</sup> Tsao, Feng-fu. 1999. The Language Planning Situation in Taiwan. *Journal of Multilingual and Multicultural Development*, 20(4 & 5): 346.

<sup>118</sup> *Ibid.*

Economically, Mandarin was intentionally created as a gateway for better communication (higher sign value), better education, and better living quality (higher exchange value); in addition, Mandarin, with higher functional value and the help of education, provided people with the access to control, possess, or operate certain knowledge or technology (higher exchange value).

The relationship among education, economic development, and language shift is exhibited in Figure 5-2.

**Figure 5-2: Relationship among Education, Economic Development, and Language Shift**



Based on Figure 5-2, education contributed to economic development and vice versa. Furthermore, with more people receiving education, it is reasonable to assume that the language structure might turn in favor of the language of education. And this is what happened to Taiwan. With better economic performances, better education became necessary, and thus the prevalence of Mandarin became inevitable.

#### **5.4 Promoting Mandarin through Examination System**

Since fleeing to Taiwan, the ROC government wasted no time in de-Japanizing and Sinicizing Taiwan. To reach that goal, the ROC government designed a system of

education that demanded proficiency in Mandarin and knowledge of Chinese culture. This was impossible without an intentionally constructed examination system that controlled the only access to higher education, professional certification, and civil service.

To successfully Sinicize Taiwan, the ROC government exerted absolute control over the examination system and defined Mandarin ability and Chinese culture as one single subject of test. During martial law period, the ROC government had set up powerful mechanisms to control the access to education and civil service, and to certification required for professional employment such as lawyer and accountant.

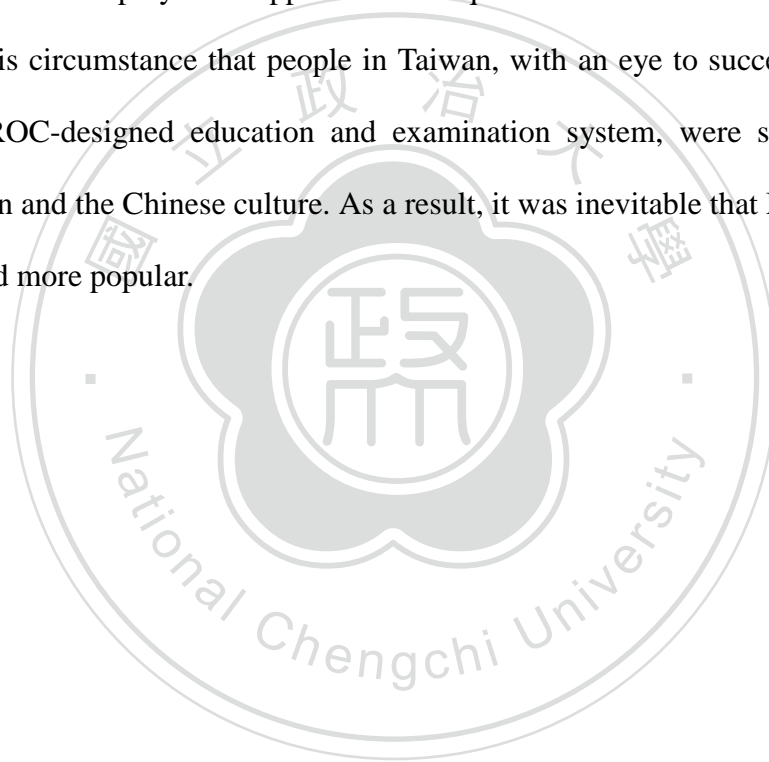
As far as education is concerned, the Ministry of Education (MOE) made Joint College Entrance Examination (JCEE) the only gateway to higher education. Through MOE, the ROC government made compulsory Mandarin-based tests that required the knowledge of Mandarin characters, classical Han, and Chinese Culture as one single subject. Thus, through such a strong intervention, the high school students seeking for better education and upward social mobility had no choice but study Mandarin regardless of whatever their mother tongues were.

As for civil service and professional certification, the Examination Yuan was the major gatekeeper since it was authorized by the ROC government to set control over the exams to civil service and professional certification.

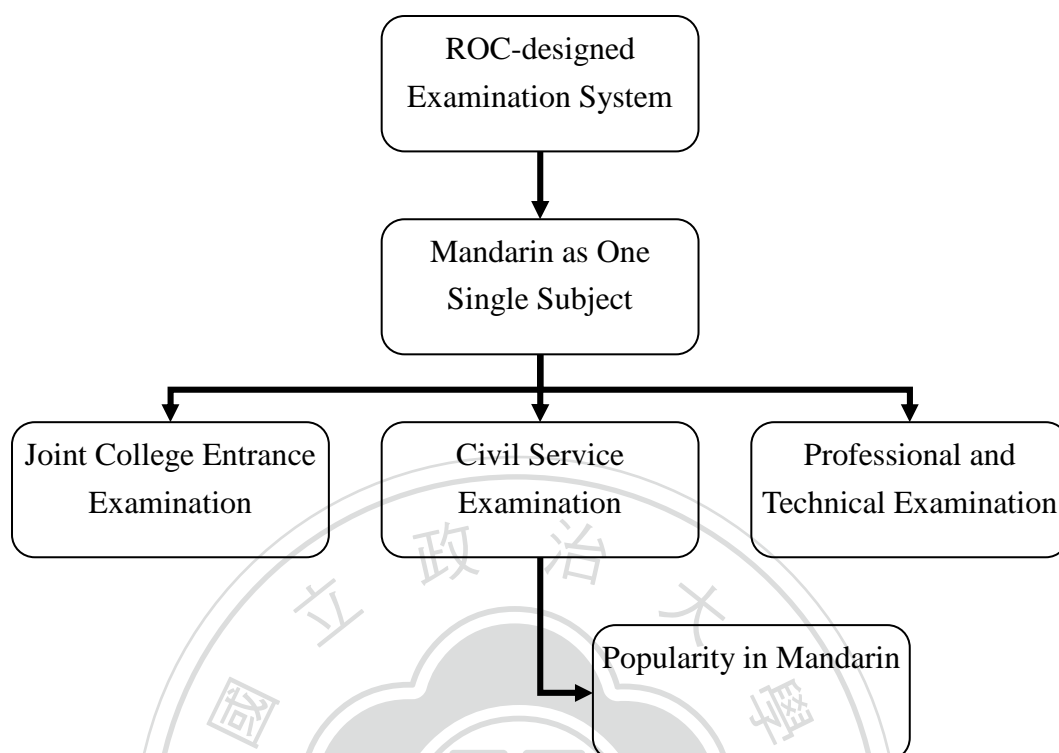
The function of the Civil Service Examination was somewhat similar to JCEE. To be a qualified civil servant, one must pass the Civil Service Examination. Again, one single subject that required Mandarin fluency was purposefully designated. And this provides one of the reasons to explain why during martial law period a large percentage of Mainlanders concentrated in the public sector. In order to gain access to professional employment such as lawyer or accountant, one was required to acquire specific certificates to legally practice it. In other words, those who desired to become

professionals must participate in the Professional and Technical Examination held by Examination Yuan. What happened to JCEE and Civil Service Examination had also happened to the Professional and Technical Examination. Mandarin was once again defined as one separate subject of test.

It has been true that education and certification through ROC-designed examination system was a prerequisite to professional jobs and upward social mobility. Under an authoritarian regime, the ROC government was able to control what kind of employment opportunities required what kind of knowledge. It was under this circumstance that people in Taiwan, with an eye to successfully surviving in the ROC-designed education and examination system, were so eager to study Mandarin and the Chinese culture. As a result, it was inevitable that Mandarin became more and more popular.



**Figure 5-3: Relationship between Examination System and Popularity in Mandarin**



In summary, as Figure 5-3 exhibits, the ROC government in order to promote Mandarin exerted absolute control over the examination system. Through MOE and the Examination Yuan, Mandarin and Chinese culture were intentionally designated as one single subject in JCEE, Civil Service Examination, and Professional and Technical Examination. In other words, those who wanted to gain access to higher education or get professional certification had to master Mandarin. Gradually, the Taiwanese society became Mandarin-dependent.

## 5.5 A Comparison between the Japan-led and ROC-led Island-wide Language Directives

This section intends to argue that political factors alone could not sufficiently explain the popularization of a certain language variety. The Japanese and ROC governments both exerted authoritarian control over the society. However, the

promotion of Japanese was not as successful as the promotion of Mandarin. Through a comparison, I suggest that people in Japanese colonial period were in lack of economic motivation to learn Japanese while in martial law period people were economically motivated to acquire Mandarin.

### **5.5.1 The Japan-led Island-wide Language Directive**

When Taiwan was ceded to Japan in 1895, the Japanese government similarly did what the ROC government had done to Taiwan. A lot of measures were taken to Japanize Taiwan and to assimilate the people into Japanese way of thinking and life. The use of Japanese language was also regarded by the Japanese government as an important step towards successful assimilation.

To promote the Japanese language, three stages of educational planning were put into practice.

The first stage, the stage of pacification, was from 1895 to 1919. During this period, the private Chinese schools that taught classical Han with Hoklo or Hakka pronunciation were tolerated. At the same time, the Japanese government encouraged people to send their children to public elementary schools, where Mandarin was a required subject. Furthermore, the Japanese teachers and officials were encouraged by the government to learn Hoklo mostly, and used Hoklo to teach Japanese. In 1915, only about 1.6% of the population in Taiwan was capable of comprehending and reading Japanese. This showed that the promotion of Japanese during this period was relatively not successful.<sup>119</sup>

The second stage, the stage of assimilation, was from 1919 to 1937. During this period, all private schools were forbidden, and Mandarin as a subject became elective.

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<sup>119</sup> Liu, Chun-yen. 2008. *A Study of Language Use of Southern Min in a Group of Insurance Salespersons in Taiwan*. Master's thesis, Providence University, p. 15.



Japanese replaced Hoklo and Hakka as a medium for teaching classical Han. The teaching of Japanese was conducted no more through Hoklo but directly through Japanese. The efficiency of spreading Japanese was greatly enhanced. By 1935, about 29% of the population was able to comprehend Japanese.<sup>120</sup>

The final stage, the stage of complete Japanization, was from 1937 to 1945. Kominka movement (皇民化運動) was launched. Local language varieties, including Mandarin, Hoklo, Hakka, and aboriginal languages, were prohibited in public domains such as government offices, schools, and banks. In 1944, those who could understand Japanese rose to 71% of the population.<sup>121</sup>

Nonetheless, the achievement in Japanese language education should not be overestimated. On the one hand, many people in Taiwan counted among those who could understand Japanese could not actually speak it. On the other hand, Japanese was never the primary vehicle of communication in daily life.<sup>122</sup>

### **5.5.2 The ROC-led Island-wide Language Directive**

To popularize Mandarin, a three-stage process was launched by the ROC government.

Firstly, the use of Japanese was prohibited. When the ROC government relocated to Taiwan, Japanese was quite popular, especially among the elite class. The ROC government was quite worried that Japanese culture might hinder the sinicization of Taiwan. Therefore, the ROC government wasted no time trying to eradicate the Japanese language as the first step to de-Japanize and sinicize Taiwan.

Secondly, the native languages of Taiwan were for a short period of time revitalized. However, the purposes of the revitalization efforts were to facilitate the

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<sup>120</sup> *Ibid.*

<sup>121</sup> Refer to Chapter 3 of this thesis.

<sup>122</sup> Hsiau, A-chin. 2000. *Contemporary Taiwanese Cultural Nationalism*. London: Routledge, p. 36.

transition from a Japanese-dominant society to a Mandarin-dominant one, and to help learn Mandarin through comparison of Mandarin and local language varieties since they are linguistically related.

Lastly, the promotion of Mandarin was highly supported and the use of non-Mandarin language varieties was strictly prohibited in public by the authoritarian ROC government. In this stage, various channels were utilized. Mandarin was intentionally designated as the only communicative and teaching medium at schools; the use of non-Mandarin language varieties was to be punished. Moreover, all young men serving the compulsory military service were encouraged to learn Mandarin. As for the mass media, local language varieties were harshly discouraged in TV and radio programs and the publishing sectors while Mandarin was highly promoted.

The ROC-led island-wide language directive was far more successful than the Japan-led one. Japanese was mainly spoken in public domains during colonial period; however, Mandarin more or less penetrated each level of society. It was estimated that approximately 72% of language use at home was Mandarin in 1996.<sup>123</sup>

### **5.5.3 A Comparison of the Two Island-wide Language Directives**

There is no denying that both Japanese and ROC governments exerted absolute control over the political, economic, social, and cultural aspects of Taiwan. With similar powers and similar goals of transforming Taiwan into their own appendage, the two island-wide language directives were supposed to end up with similar results. However, the Japan-led directive did not shake the grassroots level while the ROC-led directive more or less did.

Various reasons have been proposed to explain the different outcomes. In this thesis, I will analyze it through a comparison of the different economic backgrounds

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<sup>123</sup> Refer to Chapter 3 of this thesis.

that resulted in the success and relative failure of the two island-wide language directives.

### **5.5.3.1 Economic Development during Japanese Rule Period**

Taiwan's economy under Japanese rule could be roughly divided into agricultural and nonagricultural sectors. The agricultural sector approximately accounted for 70% of total employment while nonagricultural 30%. That is, the most important employer and producer during Japanese period was agriculture, and economic growth of colonial Taiwan was facilitated by the development of agriculture. Taiwan's industry, except for food processing, experienced fewer changes than did agriculture and remained relatively underdeveloped.<sup>124</sup>

Although from 1905 to 1940 the employment in industry expanded more rapidly than in agriculture (male occupied persons in agriculture increased by 26%, in manufacturing by 120%, and in mining by 505%), this does not indicate a drastic social change in the indigenous population nor does it specify a massive structural redeployment of Taiwanese workers. In fact, before 1930s, only a relatively small number of Taiwanese people moved out of agriculture and changed their occupation. The reason is that throughout the colonial period there was a steady migration of Japanese to Taiwan. The migration of Japanese to Taiwan was encouraged by the colonial government in an effort to ensure the political and economic control over Taiwan. Favorable treatments were given to Japanese by the colonial government and Japanese enterprises in Taiwan. The Japanese immigrants were mainly responsible for the rapid expansion in industrial employments. Politically and economically, Taiwanese were by no means on an equal footing with the Japanese.<sup>125</sup>

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<sup>124</sup> Ho, Samuel P. S. 1992. *Economic development of Taiwan, 1860-1970*. Ann Arbor: LIMI, p. 28.

<sup>125</sup> *Ibid.*: 80-82.

Furthermore, the entire colonial economy was monopolized by the Japanese, and there was an increasing concentration of capital in the hands of domestic Japanese owners. Taiwanese capital was almost completely excluded from the large-size firms, and small-scale local capital was suppressed by the colonial government and Japanese capital. When colonial rule ended in 1945, there was virtually no local industrial sector in Taiwan.<sup>126</sup>

During Japanese period, the society was stratified into two classes, namely the ruling Japanese and the ruled Taiwanese. The political, economic, and educational opportunities of the Taiwanese were strictly limited. The majority of professionals, such as teachers and lawyers, were Japanese. Employees of the government and large enterprises were mostly Japanese. Moreover, high-ranking positions in public and private were also mostly reserved for Japanese; low-ranking jobs were, more or less, the only choice for Taiwanese. The farmers were at the bottom of the society, and most of them were Taiwanese. In other words, social mobility was quite rare during this period.

Until 1922, segregation was still practiced in the educational system, and the discriminatory nature of colonial education in Taiwan at all levels was visible. Nevertheless, the so-called abolition of segregation did not actually result in the abolition of inequality in education for the Taiwanese. After the abolition of segregated high schools, an invisible line was still in existence between Taiwanese and Japanese. High schools which had been exclusively occupied by Japanese students remained Japanese-only, and the majority of students in the schools where Taiwanese students had a large representation continued to be Japanese. In terms of participation in high schools, Japanese were still in a dominant position, while

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<sup>126</sup> Wu, Yong-ping. 2005. *A Political Explanation of Economic Growth: State Survival, Bureaucratic Politics, and Private Enterprises in the Making of Taiwan's Economy, 1950-1985*. Cambridge, MA: Harvard University Press, pp. 85-89.

Taiwanese were placed in a restricted situation.<sup>127</sup>

### 5.5.3.2 An Economic Comparison

**Table 5-9: Value Comparison of Mandarin and Japanese**<sup>128</sup>

	Mandarin	Japanese
Functional Value	Equal	Equal
Exchange Value	Higher	Lower
Symbolic Value	Higher	Lower
Sign Value	Equal	Equal

According to Table 5-9, the functional value of Mandarin and Japanese were quite equal since both of them were pretty much westernized and helpful for the industrialization of the economy through education.

The exchange value of Mandarin was supposedly higher than that of Japanese for the fact that Mandarin proficiency was highly associated with the acquisition of higher socioeconomic status while Japanese was not. During Japanese period, a Japanese origin was more important in gaining upward social mobility. That is, the non-Japanese people in Taiwan did not possess high enthusiasm in learning Japanese; besides, in private situations, people also found it unnecessary to use Japanese so that the exchange value of Japanese was again decreased.

During Japanese period, people in Taiwan did not quite identify themselves with Japanese. On the contrary, the identification with Taiwan was burgeoning. Simply put, although with strong government support, the Japanese language did not gain so much symbolic value as Mandarin did since Hoklo and Hakka had been culturally and

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<sup>127</sup> Fewings, Catherine. 2004. *Japanese Colonial Education in Taiwan and Assimilation, 1895-1945*. Ph.D. dissertation, Curtin University of Technology, pp. 47-48.

<sup>128</sup> Mandarin here refers to the Mandarin spoken during martial law period and Japanese during colonial period.

linguistically closer to Mandarin, and thus helped Mandarin gain more symbolic value.

The sign value of Mandarin and Japanese were quite equal. As discussed in chapter 4, the sign value of Mandarin during martial law period was high. Japanese, whether Japanese people or not, was always the language of the elite class. The lower class, such as farmers, of the ruled Taiwanese could barely use Japanese despite the fact that they “understand” Japanese. In private domains, local language varieties were still active. Hence, Japanese supposedly contain high sign value as well.

In a word, the exchange and symbolic value of Mandarin was higher than those of Japanese. As a result, the ROC-led island-wide language directive possessed higher opportunity of success.

**Table 5-10: Comparison of Economic Development**

	Martial Law Period	Japanese Period
Structural Change	A drastic Change	Little change
Social Classes	Emergence of five social classes based on economic conditions	The ruling Japanese and the ruled Taiwanese
Social Mobility	Possible through hard work	Almost impossible
Motives and Opportunities for Education	Higher motives and relatively equal opportunities	Lower motives and relatively unequal opportunities

As Table 5-10 shows, there was a drastic structural change during martial law period but little change during Japanese period. What comes with structural change is a society that embraces more opportunities for redistribution of wealth. Consequently, during ROC rule, people in Taiwan were able to accumulate capital once worked hard; by contrast, capital accumulation was obstructed during Japanese occupation.

With drastic structural change, five social classes appeared during martial law period. People of the higher class had to strive for the maintenance of their status, and the channel to higher class was available to members of the lower class if worked hard. However, under Japanese control, the society was stratified. For the ruled Taiwanese, there was little access to the elite class. In other words, social mobility was normal during martial law period but rare under Japanese rule. The consequence is that people under ROC rule were more motivated to learn Mandarin and discouraged to study Japanese under Japanese rule.

With a more drastic structural change, a relatively more equal educational environment coupled with higher social mobility, people under ROC rule were willing and eager to pursue more education; thus, the popularization of Mandarin was unavoidable. Nonetheless, with little structural change and low social mobility together with unequal treatment in educational opportunities during Japanese period, the spread of Japanese language was hindered.

In a nutshell, the spread of Mandarin and Japanese both received strong political support; however, with higher values and a more helpful external economic environment, the promotion of Mandarin was more successful.

## CHAPTER SIX

### CONCLUSION

Language not only serves the function of communication, but it also carries the culture and cohesive power of an ethnic group. For the minority group, the maintenance of their native language, which might not contain much economic competitiveness, is associated with its ethnic vitality and dignity.

Taiwan is an immigrant society with multicultural and multilingual characteristics. In the past four centuries, Taiwan was ruled by Dutch, Koxinga, Qing dynasty, Japan, and ROC. To those regimes, particularly Japan and ROC, the blending of the ruling and ruled classes had never been an easy task.

Both Japan and ROC were quite enthusiastic in promoting a lingua franca through harsh island-wide language directives in Taiwan. However, these two island-wide language directives achieved different degrees of success. This thesis intends to offer an economic analysis to explain the successful popularization of Mandarin through critical examination and comparison of the collected materials.

This chapter summarizes the discussions of previous chapters and proposes some suggestions for the revitalization of the endangered language varieties in Taiwan.

#### 6.1 Successful Promotion of Mandarin

The successful promotion of Mandarin during martial law period results from various reasons. The explanation of the prevalence of Mandarin during martial law period was a combination of political and economic factors. Neither political nor economic explanation alone could fully expound the outcome. This thesis focuses on economic dimension.

First of all, the functional, exchange, symbolic, and sign values of Mandarin



were all higher than those of the local language varieties. As a result, the spread of Mandarin was reasonable. Second, the track of economic development also helped popularize Mandarin. The drastic structural change in economy facilitated the emergence of five social classes, the possibility of social mobility, and the desire for more education. And for those who wanted to climb the social class ladder, gain upward social mobility, and receive more education, fluent Mandarin was indispensable. In other words, proficient Mandarin skills thus generated lots of economic advantages to its speakers.

Furthermore, through a comparison of the Japan-led and ROC-led island-wide language directives, this thesis argues that economic factors, such as little structural change in economy, virtually no social mobility, and unequal treatments in education during Japanese period, were what explained the promotion of Japanese was not as successful as the promotion of Mandarin.

## **6.2 Suggestions for Maintenance and Revitalization**

It is true that the number of speakers of Hoklo, Hakka, and aboriginal languages in Taiwan is declining rapidly. If we do nothing to protect these important assets, they might disappear in the future.

This section proposes three grand approaches for future language planning. They are the establishment of a standardized and modernized writing system, institutional support, and intensification of political and economic strength of the speakers.

### **6.2.1 Establishment of a Standardized and Modernized Writing System**

The lack of a standardized writing system for Hoklo, Hakka, and aboriginal languages has reduced the functional value and hindered the promotion of these language varieties. Without a standardized writing system, the preservation and

promotion efforts will become more difficult. At present, writing systems for these local language varieties have been created; however, the standardization is still highly debated among scholars.

In addition, the local language varieties are still lagging behind in terms of introducing scientific knowledge. This is proven by the fact that even some qualified elementary school Hoklo teachers fail to pronounce some scientific terms in Hoklo, but without problem to pronounce them in Mandarin. This phenomenon has again reduced their functional value.

As a consequence, standardization and modernization of the local language varieties deserve equal attention. But so far the scholars focus more on standardization. This thesis argues that the promotion efforts would ultimately encounter some obstacles if these targeted language varieties were not modernized.

### **6.2.2 Institutional Support**

The first and most important step of institutional support is the legislation of relevant laws to protect the linguistic rights of each ethnolinguistic group. The claim by the majority group that language is no more than a medium for communication is wrong and discriminative. To the minority group, the maintenance and promotion of their language is an important indicator of an equal power relation with the majority group. For the majority group, their linguistic rights are in fact protected unconsciously, even without legal support. Nevertheless, the linguistic rights of the minority group are often, consciously or unconsciously, forsaken. Thus, laws to protect the linguistic rights of the minority group are indeed necessary. Thanks to a number of concerned scholars, the legislation of Language Equality Law (語言平等法) is attracting more and more attentions although many political and social obstacles still lie ahead.

The teaching of the local language varieties in schools, especially elementary schools, is crucial to their maintenance. Although now the mother tongue education has been promoted by the Ministry of Education, the parents, students, and even teachers actually pay little attention to the acquisition of mother tongues. It goes without saying that the focus of language education in schools has always centered on Mandarin and English. There are many activities to facilitate the learning of Mandarin and English, but few are devoted to mother tongue education. I agree that there might not be any more room to increase mother tongue courses at elementary schools, but the schools and Ministry of Education could design some extracurricular activities to motivate and encourage the students to learn their mother tongues, and also change the teachers and parents' attitudes towards mother tongue education.

Family and community are crucial to the maintenance of the shrinking language varieties. To families of the middle class, Mandarin is dominant. Parents are unwilling to use their mother tongues to communicate with their children so as to prepare their children for future education. This phenomenon is devastating. The government should encourage each family and the nearby community to use mother tongues more frequently. To do this, schools from elementary to university level could offer many resources. For instance, each school could hold events like “cultural exchange festival” or “mother tongue weekend” for the purpose of encouraging the use of mother tongues. And then families in the community are all welcomed to participate. Under such kind of atmosphere, people should be more willing to use their mother tongues. To revitalize the dying language varieties, more institutional efforts should be dedicated to family and community levels.

Today, the sign value of Hoklo, Hakka, and aboriginal languages are undoubtedly lower than that of Mandarin. Although the Taikhe culture (台客文化) was once in trend, public opinions towards Hoklo never drastically changed. Some even

despise the Taike culture. In specific regions or situations, people still regard Mandarin as the only appropriate channel to express themselves. Thus, institutional support should be devoted to the increase of the sign value of Hoklo, Hakka, and aboriginal languages. There are many ways to achieve this objective. The penetration power of pop music should be utilized. Modern elements should be blended into the non-Mandarin music so as to make it more attractive to youngsters. Singers such as Jay Chou (周杰倫) and May Day (五月天) have produced many popular Hoklo songs in the past few years. Besides, Amis music was once adopted by a well-known band called Enigma and became an international hit. However, the effect of this type of music does not last long. Therefore, the government could provide some incentives to encourage the release of this type of music. In addition to music, the promotion of Taiwanese opera (台灣歌仔戲), puppet show (布袋戲), and Hakka opera (客家戲) could definitely change people's attitudes towards these language varieties since these cultural heritages are also very delicate. Moreover, the various festivals of the aboriginal people should receive more government support and propaganda, because these festivals provide important access for the common people to understand and ultimately appreciate the culture and language of the aboriginal people. It is the government that is responsible for bringing public attention to those dying language varieties and making people understand the beauty of these language varieties.

The existent proficiency tests of Hoklo, Hakka, and aboriginal languages should receive more government support. Compared with the General English Proficiency Test (全民英檢), people in Taiwan are in lack of enthusiasm to take those tests. Therefore, more incentives should be provided by the government to encourage people, particularly students, to take them. For example, as a beginning, some rewards could be given to those civil servants who pass a certain degree of the language proficiency test.

There is no doubt that children's mother tongue ability is seriously impeded by the Mandarin-dominant mass media, especially TV programs. Although the establishment of the Hakka and Indigenous TV channels was great news to the promotion of Hakka and aboriginal languages, this is not enough since the TV ratings of these two channels are relatively low. The government could encourage the major TV channels to have more diversified non-Mandarin programs. Besides, Hoklo, Hakka, and aboriginal cartoons could also be encouraged. "Magic Grandma (魔法阿媽)," a Hoklo cartoon, was once very popular in Taiwan, and the elementary school students were thus more willing to learn Hoklo for a short period of time. This sort of TV programs, particularly cartoons, should be encouraged by the government.

### **6.2.3 Intensification of Political and Economic Strength**

Politics has always been a strong factor in determining the fate of a certain language variety. Japanese, a completely unknown language at the beginning of the Japanese period, became widespread at the end of Japanese rule. And the same also applies to the popularization of Mandarin. It is quite obvious that the political strength of Japanese and Mandarin speakers played a very influential role. Consequently, it is of special importance to further enhance the political strength of the non-Mandarin speakers, particularly aboriginal language speakers, so that a more balanced language policy could be brought up in the future.

To pursue more economic power, ethnic groups would take the initiative in learning the language of one group with a strong economic advantage equaling their language vitality.<sup>129</sup> Many Hoklo, Hakka, and aboriginal people either live in destitute places or in places where employment opportunities are relatively lower.

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<sup>129</sup>張民光，2007，A Study on the Trends of Hakka Language and Culture in Taiwan，國立聯合大學苗栗學研究中心第三屆「地域、族群與文化」學術研討論文集，頁 267。

Under such circumstances, these people naturally move to cities with higher employment opportunities. Then, their mother tongues are gradually abandoned in order to learn the dominant language variety and adapt to the new environment. Low economic strength leads to low ethnolinguistic vitality. As a result, how to upgrade the economy of the places where Hoklo, Hakka, and aboriginal languages are used frequently is an urgent task.

### **6.3 Concluding Remark**

This thesis concludes that economic factors are important in determining the successful promotion of Mandarin as a lingua franca. In the future, Taiwanese society is going to become more and more democratized, globalized, and market-oriented. This implies that the economic factors will also become more and more crucial to the maintenance or revitalization of the dying language varieties.

Due to globalization, it has been argued that in Taiwan the language at the top of the language hierarchy is no longer Mandarin but English. As for Taiwan, English has never appeared as a colonial language. But the advent of English is unstoppable. The reason is obviously economic. It seems that nowadays parents are eager to “force” their children to learn English in preparation for a more promising future just as similar to what had happened during martial law period. For Mandarin, its status will not be challenged, but for Hoklo, Hakka, and aboriginal languages, this economic-driven phenomenon will trigger another disaster.

The preservation of a language variety is never an easy job. With the coming of a globalization era, the government, scholars, and those who are concerned about the maintenance and revitalization of Hoklo, Hakka, and aboriginal languages should pay more attention to the economic dimensions. People nowadays will not be interested in learning a certain language without economic incentives. In other words, how to

create economic values for Hoklo, Hakka, and aboriginal languages poses a great challenge for the years to come.



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