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Topical Section: Education and Society in Contemporary Taiwan

Introduction: Education, Identity, and Development in Contemporary Taiwan

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Abstract

Mass formal education is a feature of modern societies all too often taken for granted or overlooked in mainstream sociological analysis. In this respect, the field of Taiwan studies is no exception. This introductory essay sets the three papers of this topical section in historical and comparative perspective, particularly in relation to East Asia. The papers show how education policy in contemporary Taiwan has evolved in a context of vibrant democracy, economic transition, demographic squeeze, and, looming over all, the threat from the Chinese mainland. Our focus falls especially on higher education and language instruction, and their involvement in debates over economic prosperity, security, identity, and Taiwan's place in the world. A central theme of this introductory essay is the way in which educational debate in Taiwan is conditioned by awareness of insecurity—at individual, familial and societal levels. The intensely

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competitive, human capital-oriented approach to education that predominates there is bound up in complex ways with the insecurities of life on this island.

Keywords

education – language – development – universities – identity – human capital

Taiwan has long been viewed, alongside post-war Japan, South Korea, Singapore, and Hong Kong, as a paradigmatic case of the successful 'developmental state'. Attempts to explain the phenomenal post-war growth of these 'highly performing East Asian economies' have given prominence to the role of education—not just in fuelling economic expansion, but in contributing to a distinctive pattern of rapid growth with increasing socio-economic *equality* (though here the former British colonies of Singapore and Hong Kong diverged significantly from a more equal Northeast Asian 'Japanosphere' encompassing Taiwan and South Korea) (Green et al., 2007). In Taiwan, as in South Korea, the rapid universalisation of secondary education was crucial to the emergence, by the 1980s, of a more diverse, sophisticated economy, staffed by a highly literate, aspirational urban middle class. Given the crucial role of these younger, more educated urbanites in the campaigns against dictatorship in both Korea and Taiwan, education has also been seen as important in paving the way for democratisation in these societies.

But what of education's role in the slower growing, democratic Taiwan of the post–martial law era? What of its broader function in society, beyond the generation of 'human capital' for economic growth? And what of education's contribution to state formation in a society whose very claims to statehood have confronted an intensifying challenge from its closest neighbour? In this introduction to the topical section of the *International Journal of Taiwan Studies*, we seek to illuminate some of the key issues of educational debate in contemporary Taiwan, analysing the role education has played in attempts to respond to some of the most pressing challenges the island has faced.

Before examining the challenges peculiar to Taiwan, it is pertinent to situate these in a broader context by outlining features shared with the island's East Asian neighbours. Perhaps the most fundamental is the emphasis on education's role in what Wang, in his paper here, dubs 'national development planning' (Wang, 2021). Associated with a strong human capital orientation, this comes with a heavy curricular emphasis on maths, science, and the national language (and, at tertiary level, on STEM subjects). The focus on human

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capital generation further betokens a profoundly instrumentalist, economistic conception of the purpose of education: learners are valued essentially as (potential) units of productive capacity (UNESCO-MGIEP, 2017: chap. 3). High-stakes assessment regimes serve both to select the best and brightest for service to the state and economy, and to supply meritocratic justification for the distribution of the rewards of growth. Meanwhile, schooling is further tasked with disciplining citizens through the inculcation of a uniform ethico-political vision. For this purpose, the central state maintains strong oversight over curriculum development and textbook production. 'Traditional values' are invoked to reinforce collective identity, although an emphasis on ethical uniformity and uncritical loyalty has increasingly clashed with an aspiration to foster 'creativity' and 'critical thinking' (again for essentially economistic purposes). 'Tradition' is also portrayed as mandating familial self-reliance and minimal provision of social security—a pattern that helps drive the intensity of educational competition and credentialism. The result has been a mounting educational 'arms race', with tertiary education now a universal aspiration, and private provision, especially of examination-focused supplementary tutoring, consuming an increasing proportion of familial resources. Educational intensity, minimal social security, and patriarchal cultural assumptions have all contributed to extremely low fertility in Taiwan, as they have across East Asia: the island's fertility rate, estimated at 1.07 births per woman, currently ranks as the world's lowest.[1]

In so far as this very generalised portrait of education's role in Northeast Asia's developmental states holds true, Taiwan can be seen as epitomising both its achievements and its flaws. To what extent, though, has the established vision of education's purposes or functions survived the island's transition to democracy? As Lin and Huang note in their paper here, Taiwan's democratisation in the 1990s was accompanied by demands for a less regimented, less instrumentalist approach to public education (Lin and Huang, 2021). Democracy also intensified pressure on the government to significantly expand access to higher education, hitherto very much an elite preserve. Meanwhile, alongside calls for changes to structure and access came mounting demands for a radical curricular shift away from the pervasive Chinese nationalism of the previous half-century. In 1995 the Democratic Progressive Party's (DPP) 'Give Taiwan a Chance' manifesto called for the 'promotion of consciousness of Taiwan citizenship', 'taking Taiwan as the central subject' in history and literature, moves towards 'bilingualism', and a liberalisation of textbook production to promote

1 According to figures compiled by the CIA: https://www.cia.gov/the-world-factbook/field/total-fertility-rate/country-comparison (accessed 8 November 2021).

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greater 'pluralism' (Corcuff, 2005: 137). The DPP lost that election, but under President Lee Teng-hui of the Kuomintang (KMT) significant steps were taken during the late 1990s towards implementing this agenda.

However, the Cold War mindset informing the martial law era's hard-nosed focus on human capital and political socialisation did not simply evaporate with Taiwan's bright new democratic dawn. This was not just because old habits die hard but also due to the persistence of Taiwan's 'Cold Civil War' with the People's Republic of China (PRC) (Mitter and Major, 2004). The siege mentality that underpinned developmental statism across Cold War East Asia has waxed and waned since the 1990s but remains acute in a society constantly threatened by its closest neighbour. The educational competition that renders individuals and families entrepreneurs of their own human capital[2] is a microcosm of the brutally Darwinian international environment in which Taiwan must struggle for survival.

The three papers in this topical section examine how education policy in contemporary Taiwan has evolved in a context of vibrant democracy, economic transition, demographic squeeze, and, looming over all, the threat from the Chinese mainland. They focus especially on higher education and language instruction, fields intimately involved in debates over economic prosperity, security, identity, and Taiwan's place in the world. East Asian societies are often somewhat stereotypically portrayed as culturally disposed to attach 'high stakes' to education, but for Taiwan the stakes are nothing short of existential. As the papers here show, this consciousness of high stakes—informed by culture, ideology, and strategic calculation—pervades Taiwanese thinking on education in ways that both reflect and transcend disputes over the island's identity.

1 Credentialism, Competition, and Higher Education

Like its Northeast Asian neighbours, Taiwan during the martial law era pursued a strategy for higher education that was resolutely focused on fostering human resources for economic development. This dictated a concentration of public investment at the commanding heights of the university sector, with the aim of generating the technical knowledge and skills deemed economically vital. Emblematic of the intimate relationship envisaged between publicly funded

2 This concept is elaborated by Markovits in his analysis of 'The Meritocracy Trap' (2019).

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skills generation, research, and development and industrial innovation was the Hsinchu Science Park, established near Taipei in 1980 (Greene, 2008).

Targeted at state-determined ends, and conceived as a form of elite manpower planning, public investment in higher education and research was also relatively parsimonious. This has largely remained the case in the early twenty-first century, with public spending on higher education in Taiwan, as elsewhere in Northeast Asia, significantly lower than in the USA, Britain, or Australia (though higher than in many European societies).[3] The rapid growth in college enrolments since the 1990s, so that today around 95 percent of high school graduates enter university (up from around 20 percent in 1991), has witnessed a huge expansion of private provision, funded mainly by user fees. As Lin and Huang note, while the number of universities has trebled over the same period, budgetary allocations for higher education have merely doubled. Growth in the number of universities has also been accompanied by shrinkage in the technical or vocationally oriented non-degree tertiary education sector. Massive expansion of provision and changes to college entrance examinations have not led to any noticeable diminution in competitive intensity. The universalisation of higher education has predictably led to significant falls in average graduate salaries. With a university degree no longer conferring elite status, students and parents jostle for places on the most prestigious courses at 'top' institutions.

While permitting demand-led massification of higher education, policymakers have continued to prioritise investment in elite institutions, with the ultimate aim of maintaining or enhancing national economic competitiveness. Indeed, with the universalisation of senior high schooling now achieved, and low-skilled work long since displaced by high-technology manufacturing and services as the mainstays of Taiwan's economy, higher education has become central to debates over education's contribution to economic development. Since the early 2000s, the 'Aim for Top University Project' (ATUP, 2005–2017), and more recently the 'Higher Education Sprout Project' (HESP), have funnelled money towards elite institutions, led by National Taiwan University (NTU). The launch of ATUP in 2005 was undoubtedly prompted in large part by the initiation of similar programmes by the PRC government across the Taiwan Strait: its aims echo those of China's 211 and, especially, 985 Projects (Vickers and Zeng, 2017: chap. 8).[4] Like their counterparts in China, South Korea, and

3 See data from Taiwan's National Development Council: https://www.ndc.gov.tw/Content_List.aspx?n=370BD5BCD05AD77F (accessed 1 November 2021).

4 The 211 and 985 projects were initiatives funded by China's central government designed, in the former case, to build up regional 'champions' in the higher education sector and, in the latter, to nurture 'world-class' research and teaching capacity in particular fields.

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Japan, the Taiwanese authorities have embraced global university rankings as a proxy for the competitiveness of their higher education systems—and, by implication, of their capacity to contribute to economic growth. Enamoured of quantitative metrics, ministerial bureaucrats have seen global league tables as a convenient tool for gauging institutional 'quality' and enforcing fiscal oversight in the name of accountability.

Designed to nurture a select elite of flagship universities, the ATUP was accompanied by other projects aiming to enhance teaching and more vocationally oriented technical and engineering programmes. But it was to the research-intensive 'top' universities that most additional funding was channelled. As Lin and Huang show, there were tensions between those wishing to promote NTU as Taiwan's solitary 'global' university, and representatives of other universities (and regions) seeking their own slices of the funding cake. In the end, fully one third of ATUP funding was allocated to NTU, but 'regional balance' dictated substantial distribution of funds to other institutions, including several in central and southern Taiwan. The new funding was meanwhile also deployed to encourage consolidation among elite universities, with two university consortia established by the late 2010s: a 'University System of Taiwan' (incorporating four universities) and the 'National Taiwan University System' (consisting of NTU and two neighbouring universities in Taipei's Da'an District).

Lin and Huang see ATUP as 'a balanced attempt to maintain the advantages of Taiwanese higher education', enabling elite institutions more or less to keep pace with their global counterparts. Measured in terms of 'rankings', NTU and several of the other universities involved managed at least to maintain their international standing. However, 'unintended consequences' included the transformation of ATUP itself into what was seen as an elite 'club', membership of which became an end in itself for Taiwanese university leaders; one actually went on a public hunger strike in 2005 in a vain attempt to reverse his institution's exclusion from the programme. The programme spurred a 'homogenisation' of universities around a research-centric model—a phenomenon familiar in other systems that have adopted research assessment exercises or a competitive focus on international rankings as benchmarks of university performance. As Lin and Huang note, use of SCI or SSCI[5] citation counts to assess academic 'productivity' is especially detrimental to the standing of research in the social sciences and humanities, because of the particular difficulty that non-native English speakers experience in producing publishable papers in

5 Science Citation Index and Social Sciences Citation Index.

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these disciplines. A further 'unintended consequence' they neglect to mention is the way that pressure to seek SCI/SSCI citations skews humanities and social science research towards themes and concerns that appeal to editorial boards and reviewers overwhelmingly dominated by Western or Western-based scholars—a major issue for scholarship in all Asian societies where such metrics have been prioritised (see also Chou and Ching, 2012).

By the mid-2010s, the combination of a rapidly shrinking youth population and competition from overseas institutions precipitated a crisis for the now greatly expanded higher education sector. Lin and Huang identify highly ranked universities in Hong Kong and Singapore as particularly strong competitors, although, more recently, political repression there has doubtless dented Hong Kong's attractiveness to Taiwanese youth. The replacement of the ATUP by the HESP saw a shift from the prioritisation of research to a greater emphasis on teaching and 'social responsibility'—again echoing overseas trends in university performance assessment (such as England's 'Teaching Excellence Framework'). More research-intensive universities have lost funding under HESP, while institutions with relatively low enrolment rates have received additional support—something Lin and Huang deplore as 'unreasonable'. They also criticise the destabilising implications for the sector of this sudden policy shift. The abandonment of the ATUP is portrayed as a needless and counterproductive jettisoning of a policy that, on the whole, had succeeded in maintaining the international competitiveness of Taiwan's elite universities.

However, controversy over the higher education policies of the DPP, in government since 2016, needs to be understood in the context of electoral competition with the KMT, and the two parties' different regional constituencies. With its main strongholds in southern and central Taiwan, the DPP has always viewed Taipei's elites with distinct ambivalence. Diverting funding to smaller, less prestigious colleges remote from the capital is consistent with an agenda that favours redistributing resources from the Taipei establishment to less favoured regions. To some extent, the contrast between the priorities of the ATUP (enacted by a DPP president in uneasy tandem with a KMT-dominated legislature) and HESP may reflect a difference of emphasis regarding the aims of higher education. If its overriding mission is seen as supporting 'national development planning', then concentrating resources in elite institutions may seem desirable or even inevitable. But if higher education is conceived more as a public good or civic entitlement, rather than a state asset, then a greater emphasis on distributional concerns may follow.

Similar concerns are at play in disputes over reforms to university entrance examinations. Modifications to what was originally a highly centralised process date back to the late 1990s, but in recent years further changes have been

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mooted with the aim of 'diversifying' entry routes into university or college (Chiang and Lin, 2020). The rationale for this is to broaden the pool of talent from which universities can recruit, while also producing a system fairer to bright students who struggle to perform in conventional examinations. Proponents of reform, including the Ministry of Education, have pushed for an element of continuous assessment, through the adoption of 'learning profiles' that document students' progress through the three years of senior high school. At the same time, controversy has pitted NTU, broadly happy with an established system whereby it creams off the highest-scoring high school graduates, against other universities keen to use multiple entrance channels to challenge NTU's dominance. Sceptics of continuous assessment pounced on a scandal in late 2021 involving the loss of the academic records of almost 8,000 high school students (Lin and Hetherington, 2021).

One factor in debates over reform to college entrance examinations across East Asia has tended to be the aspiration to dial down the competitive intensity of schooling. However, diversification of the content or format of the testing regime has generally proved of limited effectiveness in this regard; greater diversity of college entrance routes can actually make the system more difficult to navigate, thus enhancing advantages enjoyed by those from better resourced, more educated households. It is unclear as yet whether Taiwan's recent experiments with an element of continuous assessment in high schools will yield a different outcome.

2 The Politics of Bilingualism and Multilingualism in Taiwanese Education

Competitive credentialism in Taiwanese society is manifested most starkly in the proliferation of private tutorial schools—another feature that the island shares with its East Asian neighbours. The authorities have not attempted to introduce draconian measures to limit or ban private supplementary tuition, as China's government has recently done; such measures are in any case ineffective, since they address a symptom of educational competitiveness rather than the root causes (see Mizala et al., in press). Indeed, private tutoring or 'shadow education' has become so entrenched in Taiwan's educational landscape as to constitute an accepted, 'normal' feature of the system.

As Wang details in his paper, the intensification of credentialism that accompanied the rapid expansion of higher education from the 1990s witnessed an exponential growth in private tutorial schooling. Especially in demand was English language tuition, seen as crucial not only in the domestic

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race for college admission but also for access to overseas universities, in a society where degrees from prestigious Anglophone institutions are seen as a ticket to elite status.

Politicians in democratic Taiwan have thus faced growing popular demand for expanded provision of English language instruction, creating tensions with other priorities for the education system. The long-standing focus on manpower planning was associated with English language instruction for a relatively restricted elite; for everyone else, the priority was instruction in Chinese (Mandarin), maths, and science. Following democratisation in the 1990s, however, not only was such elitism harder to defend, but demands for expanded English language teaching also had to contend with calls for more instruction in Taiwanese 'mother tongues'. Limited instructional resources (not least the supply of suitably qualified teachers) as well as timetable constraints have made it hard to reconcile these competing priorities.

In general, the DPP has been significantly keener than the KMT to expand instruction in both English and diverse 'mother tongues'. Under the first DPP administration of President Chen Shui-bian in the early 2000s, there were some efforts to clamp down on English language instruction in private kindergartens in response to expert warnings of detrimental effects on young children. Predictably, these proved ineffective in dampening parental demand. Meanwhile, the Chen administration also sought to establish English as a semi-official language alongside Mandarin Chinese, and introduced a Native English Speakers Scheme for recruiting native-speaking English teachers to work in public schools. These moves were both a response to popular demand and consistent with DPP ambitions to lessen dependence on China and strengthen ties with the West. However, plans to promote Mandarin-English bilingualism were stymied by continuing KMT control of the legislature.

For its part, the KMT's more elitist, instrumentalist, and China-focused orientation has been associated with a more cautious approach to reforming or expanding the language curriculum. Although the administration of President Ma Ying-jeou (2008–2016) embraced 'internationalisation' in its national development plan, Wang explains that this envisaged a relatively peripheral role for English language education, in part because the KMT was more focused on enhancing ties with the PRC.

When the DPP's Tsai Ing-wen recaptured the presidency in 2016, sending relations with China into a deepening freeze, the administration once again sought to reduce dependence on its giant neighbour. A 'New Southbound Policy' aimed at enhancing relations with Southeast Asia was one consequence. Another was a renewed drive for 'bilingualism' in the 2017–2020 National Development Plan, with the goal of making Taiwan a 'bilingual country' by

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2030. The teaching of English at primary level was slated for expansion, and the long-standing ban on English instruction in early childhood education was lifted. The year 2021 was the first in which 'bilingualism' was due to permeate every level of formal education, from primary to tertiary. However, Wang stresses that various practical barriers remain to the successful implementation of this policy, not least the challenge of training a cohort of Taiwanese teachers capable of delivering instruction in or through English (see also Lin and Wu, 2021).

Nor is this the only such challenge the current administration has set itself with respect to language education. From the 2022/2023 academic year, secondary as well as primary schools are obliged to teach a 'local' language as a compulsory subject, with the language (or languages) offered to be determined by schools. As with plans to expand instruction in English, this will strain the capacity of the system to deploy suitably qualified language teachers.

What, though, is the ultimate purpose of these reforms to language education? Is the overriding aim proficiency, or is it to express or reinforce a certain consciousness of identity? In the case of Mandarin-English 'bilingualism', instrumental, economic, or strategic goals seem especially important; this is portrayed as a means of enhancing Taiwan's capacity to trade and engage internationally, lessening reliance on China. Even here, though, considerations of identity lie not far beneath the surface of policy discourse: sentimental alienation from the Chinese 'motherland' spurs a desire to promote economic detachment from it.

In the case of 'mother tongue' education, as Ferrer argues in her article, identity clearly trumps proficiency (Ferrer, 2021). Comparing the relationship between language education and notions of 'multiculturalism' on Taiwan and in the PRC, she finds that instruction in 'minority' languages has in fact been taken far more seriously in Communist China than in its so-called 'renegade province' (notwithstanding a marked recent shift on the mainland towards Mandarin monolingualism). This is not, however, a sign of Communist multicultural sensitivity. In the PRC, minority languages are used at lower levels of the education system to induct children of non-Han ethnicity into a unitary Chinese nation, preparing them for the transition to Mandarin-medium instruction at secondary and tertiary levels. In other words, these languages are seen as crucial tools binding 'minority' populations more closely to the party-state. Any concern for the intrinsic value of these languages, or the cultures in which they are embedded, has never been a prime consideration, and has further faded under the leadership of Xi Jinping.

In Taiwan, by contrast, non-Mandarin 'mother tongues' are taught not primarily for instrumental purposes but because of what they symbolise. Taiyu,

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Hakka, the various indigenous languages, and, more recently, languages associated with 'new residents' (*xin zhumin*) from mainland China and Southeast Asia have acquired a curricular niche because they embody a consciousness of Taiwan as something more or other than simply a 'Chinese' society—that is, as a diverse, multicultural Asian democracy. They are taught essentially as 'heritage languages', rather than for reasons of economic utility or as vehicles for propagating a totalising vision of unitary nationhood. More utilitarian aims are sometimes invoked, for example in the case of new immigrant languages, whose usefulness is associated with the goal of enhancing relations with Southeast Asian societies through the 'New Southbound Policy'. However, the curriculum for these languages not only prioritises cultural heritage over linguistic proficiency but also presents a highly selective vision of heritage remote from the experience or background of many immigrants themselves. In fact, many new immigrants from countries such as Burma, Malaysia, or the Philippines are ethnically Han, but the goal of emphasising the contribution of Southeast Asian cultures to Taiwan's diversity ironically leads to a downplaying of the diversity that exists *within* the societies from which these immigrants come (Kasai, 2022).

3 Beyond the 'Human Resources' Paradigm: What Kind of Education for What Kind of Taiwan?

Contemporary debates over language instruction, the role of universities, and much else—notably history education and the representation of cultural heritage (see Jones, 2013; Vickers, 2021)[6]—illustrate how education, in Taiwan as elsewhere, is far more than a technocratic matter. Technocracy has in many respects served Taiwan well, but today the sustainability of an educational model premised on a vision of citizens as resources for national development seems increasingly questionable. Technological shifts, growing automation, and heightened insecurity of employment present acute challenges for a social contract premised on meritocratic self-reliance and minimal provision of public welfare. In these circumstances, to what extent should education be seen primarily as an instrument for funnelling 'talent' to fuel economic growth or state aggrandisement, or as an end in itself: an intrinsically valuable activity that lends enhanced meaning to our individual and communal existence?

6 Disputes over proposed changes to the history curriculum were largely responsible for derailing the implementation of a curriculum reform originally scheduled for 2014 (Yang, 2016); this eventually took effect only in 2019.

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These are universal questions that apply well beyond Taiwan. But they are perhaps especially acute in a society where the status and identity of the state itself are contested, and where economic prosperity and existential peril coexist in a way that denizens of other 'advanced' economies may struggle to imagine. That sense of Taiwan as an island under siege helps sustain a technocratic emphasis on human resources generation, even while it lends a special urgency to debate over what kind of society these 'resources' should serve. Whichever way we look at it, education in Taiwan today remains a 'high stakes' affair.

It is therefore impossible to disentangle the concerns over identity so prominent in Taiwan's public debate over education with ostensibly more 'practical' considerations of economic utility. Even if it is accepted that education's goals should be defined in relation to a 'national development plan', conceptions of shared identity and values inevitably inform interpretations both of nationhood and of development. Tensions and disputes surrounding education are not only symptomatic of a febrile consciousness of economic and geostrategic insecurity; they are also reflective of the democratic vibrancy of Taiwanese society, in which such crucial issues can be debated with an openness unique in Asia.

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