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**Article (Published version)  
(Refereed)**

**Original citation:**

Shih, Fang-Long and Jones, Carol (2014) *Introduction to Taiwan and Hong Kong in comparative perspective: centres–peripheries, colonialism, and the politics of representation*. [Taiwan in Comparative Perspective](#), 5. pp. 1-20. ISSN 1752-7732

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Available in LSE Research Online: September 2014

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## **Introduction to Taiwan and Hong Kong in Comparative Perspective: Centres–Peripheries, Colonialism, and the Politics of Representation**

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Taiwan and Hong Kong<sup>1</sup> are both primarily defined in relation to the Chinese Mainland, although their histories are also marked by strong associations with colonial empires: in Hong Kong, the British (1841–1941, then 1945–1997) and the Japanese (1941–1945); and in Taiwan, the Spanish (in the north 1626–1646), the Dutch (in the south 1624–1662), the Japanese (1895–1945), and arguably the KMT (1947–1987). In both locations, contemporary politics is consequently marked by struggles over contested histories, identities, languages, and cultures, in which questions of political representation have become increasingly important.

In this introduction, we place this current situation of contested identities and politics in historical context. From the perspective of the Chinese Imperial court, Hong Kong and Taiwan were always regarded as peripheral, barren places populated by barbarians, rebellious pirates, and illiterate fishermen. Further, both locations were respectively ceded to and governed by British and Japanese colonial empires, which, in contrast to China, perceived fertile land with economic potential in locations of strategic importance. Hong Kong and Taiwan were thus brought into the world capitalist system by the colonial powers, and underwent rapid transformations from rural modes of life into modern capitalist formations. However, both locations were profoundly affected by the conflict between the Nationalists and the Communists on the Chinese Mainland after World War II: Hong Kong's population trebled due to the arrival of refugees, while the eventual defeat of the KMT led to the retreat of the Nationalist government to Taiwan. Throughout these histories of migration, resistance, colonialism, and civil wars, the so-called 'ethnic group' (族群) has emerged as a new category of historical subject that challenges the very concept of 'the Chinese', and the result has been a politics based around competing identities and representations.

The crucial question here is whether the politics of identity in Hong Kong can develop in such a way under the 'one country, two systems' model that its inhabitants will be allowed to take responsibility for organizing their own lives together, and decide what common rules they will live under. This in turn raises

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<sup>1</sup> By Hong Kong is meant here the region comprising Hong Kong Island 香港島, Kowloon 九龍, New Territories 新界 and outlying islands.

another question, of whether Taiwan will be able to retain its own identity and democracy if it is forced to follow the model of Hong Kong. The outcome will depend on to what extent Hong Kong will develop a representative political system, and whether democratic culture in Taiwan can be enriched and given a firm basis. As such, rather than being a comprehensive comparison of both locations, this introductory essay aims to highlight parallels beyond the most readily-apparent connections, as well as resonances that exist between the two locations despite the lack of direct communication. In particular, we explore centre–periphery dynamics in imperial China, as well as in colonialism and the world capitalist system, as well as democracy as a universal value and the politics of representation after World War II.

### **On the Periphery of Chinese Imperial Courts**

Imperial China tended to define its domain as a land naturally bounded by mountains, rivers and seas, and places such as Taiwan and Hong Kong were regarded as peripheral, both geographically and politically. Hong Kong is off the southern coast of China, located in the South China Sea at the mouth of the Pearl River Delta, while Taiwan is separated from the southeast coast of China by the Taiwan Strait, which is about 161 kilometres wide. Both locations were inhabited by indigenous peoples who predate the first Han Chinese immigrants. Taiwan, up until the early seventeenth century, was inhabited almost exclusively by Austronesian peoples, with linguistic and genetic ties to other Austronesian ethnic groups spreading over maritime Southeast Asia, Oceania, and Madagascar, while the Hong Kong region was originally home to the Yao people, and to the boat-dwelling Tanka (疍家), who were descended from the Dan who were probably themselves also of Yao stock.

Due to conflict in the centre and north of China over many years during the Song Dynasty (960–1279), the focus of Han civilization shifted to the river valleys and plains of southern China, with the coastal Fujian and Zhejiang provinces becoming the Han demographic and cultural centres (Shepherd 1993: 398). The remoteness of Taiwan and Hong Kong from the Imperial Court meant that these locations became home for those who needed to flee China during periods of economic, political, social, and cultural upheaval.

In time, Hong Kong became the final bastion for the Han Chinese rulers of the Southern Song Dynasty, who were defeated in the war against the Mongols: the Song Court retreated to Lantau Island (大嶼山), and the last Song Emperor Bing (宋帝昺) was enthroned there at the age of eight in a place called Mui Wo (梅窩). After his final defeat, the child Emperor ended his life by drowning with his officials, in what is today known as Yamen (崖門) Town. One of these officials, named Hau Wong, is still enshrined and worshipped in Tung Chung (東涌) Valley on Lantau Island in Hong Kong today.

Centuries later, Taiwan similarly became the last refuge of Ming Dynasty loyalists who rejected Qing rule, with Zheng Cheng-gong (鄭成功, also known as Koxinga 國姓爺) and his successors establishing the Kingdom of Tungning (東寧王國) on the island after retreating from Amoy in 1661. This entwined the fates of Taiwan and Hong Kong, when the Kangxi Emperor ordered a Great Clearance (1661–1669) of the southern coast as a measure to isolate the Zheng family

regime. It was reported that around 16,000 so-called 'locals' belonging to the five clans (who had arrived during Southern Song Dynasty period) were forced to leave Hong Kong, and only 1,600 later returned (Ingham 2007: 7). Meanwhile, Zheng ousted the Dutch from their settlement of Zeelandia (熱蘭遮城) on Taiwan, but he died soon after the last Ming claimant had been captured and killed, and his grandson eventually surrendered to Shi Lang (施琅), the Qing admiral, in 1683. After this, Taiwan fell under nominal Qing authority.

While Hong Kong's first population boom occurred during the Yuan period of Mongol rule in China, Taiwan saw large numbers of Chinese immigrants arrive during the Qing period of Manchu rule in China. In both cases, the refugees and migrants were initially led by frontiersmen and traders, and they brought their native languages and cultures to their new homes: in Hong Kong, the first Han Chinese immigrants, known as 'the five clans of Tang, Man, Liu, Pang, and Hau' (新界五大氏族 - 鄧文廖侯彭), were largely Hakka. From the eleventh century they settled in the New Territories (for further details see Tang n.d.), which was part of Guangdong (Canton) province until 1898, and they gradually adopted Cantonese. Moreover, from the time that Chinese settlers to Hong Kong brought Sinicization, the indigenous Yao and Tanka peoples were gradually Sinicized, and they now speak Cantonese (Ng with Baker 1983: 22–23). In Taiwan, the majority were from Southern Fujian, and they spoke the Quanzhou (泉州) and Zhangzhou (漳州) forms of the Hoklo (福佬) language. There was also a minority of Hakka (客家) people who were originally from the border between Fujian and Guangdong.

The early Qing era saw the development of the largest empire in Chinese history under the Kangxi (reigned 1661–1722), Yongzheng (reigned 1722–35) and Qianlong (reigned 1735–1796) Emperors. However, Taiwan and Hong Kong were regarded as secluded and barren places in the East, occupied by savages, pirates, and rebels. The Kangxi Emperor showed no interest in ruling Taiwan; the island was a distant 'ball of mud' and therefore, in his view 'taking it is no gain; not taking it is no loss' ('彈丸之地; 得之無所加, 不得無所損'). Originally, it was envisioned that Taiwan would be abandoned and its Chinese population evacuated once all the resistance forces were defeated. It is estimated that the Chinese population in Taiwan in 1684 dropped by a third, leaving fewer than 80,000 individuals (Shepherd 1993: 106). Most of those who remained had married indigenous women and held property on the island.

However, Admiral Shi had a different view of Taiwan; he argued that abandoning Taiwan would likely turn it into a lair of pirates, and as such it was worthwhile maintaining control of the island, at least to keep it out of the hands of hostile powers. The Qing court eventually took Shi's advice, and in 1684 the island was made a prefecture of Fujian province. However, the new prefecture was difficult to govern, due to numerous fights between the new Han settlers and the indigenous Austronesian people; there were also constant conflicts between Quanzhou and Zhangzhou speakers over land, and these Fujian settlers also fought later settlers from Guangdong.

Qing rule over Taiwan therefore was not concerned with developing the island, but rather with preventing it from becoming a source of trouble (Shepherd 1993: 105–108, 142–146). Thus, a partial quarantine was imposed: the ban on maritime commerce was lifted, but crossings between the Mainland and Taiwan were regulated and required travel papers approved by the authorities on both sides of

the Taiwan Strait. Also, while promoting the repopulation of coastal areas under Han control, the Government placed strict restrictions on migration from the Mainland. Immigration policy fluctuated, with periods up until 1788 during which male labourers who travelled seasonally to the island were not allowed to bring their wives or families.

These quarantine policies, however, were undermined by population growth and economic expansion that increased the demand for frontier products. Han frontiersmen thus sought opportunities within local networks and gained access to local resources, resulting in inter-marriage with Aboriginal women and the growth of mixed families. Many single Chinese men married locally, as described in a Taiwanese saying: 'We have Han Chinese grandfathers, but no Han Chinese grandmothers' ('我們有唐山公，沒有唐山嬤'). Additionally, Chinese migrants tended to form bonds of cooperation with their fellows from the same ancestral place. These associations were formalized in the late imperial era through the founding of organizations called *tongxianghui* (同鄉會), which were run on democratic lines and open to most fellow migrants. Religion also helped to promote solidarity among fellow migrants via the worship of common ancestors and also the patron god/desses from their ancestral places (J. Cole 1996:158–159).

#### **The Colonial Powers and the World Capitalist System**

Hong Kong, as it exists today, was the outcome of negotiations and three treaties signed between China and Britain over fifty years in the nineteenth century, at a time when the Qing Empire was in decline. Following the First Anglo-Chinese War (also known as the First Opium war, 1839–1842), the Qing signed the Treaty of Nanjing, which ceded the island of Hong Kong to the British in perpetuity. After the Second Anglo-Chinese War (1858–1860), the Convention of Peking gave the Kowloon peninsula (and Stonecutters Island 昂船洲) to the British, again 'in perpetuity'. Finally, against extensive armed resistance, the Qing Empire signed the Second Convention of Peking, which gave the New Territories and outlying islands to the British on a one-hundred year lease in 1898. Granting Hong Kong extraterritorial status was, at the time, seen by the Chinese as convenient, as it meant that the foreigners there could more easily govern themselves (Hsü 2000: 191).

With attacks by British and French forces in 1884–1885, the Qing court eventually realized the strategic importance of Taiwan. The island was brought under tighter control and raised to full provincial status. It was also given a higher-ranking governor with a military background, Liu Ming-chuan (劉銘傳, governor 1885–1892). Under Liu's governance, a public education system and light industry were introduced, along with telegram and postal services and also a railway along the northwest coast from Keelung (基隆) to Hsinchu (新竹). However, within less than three years, the Qing Empire was forced to sign the Treaty of Shimonoseki after losing the First Sino-Japanese War (1894–1895). This treaty ceded Taiwan, together with Pescadores, to the Japanese in perpetuity.

Hong Kong's experience of British colonialism was somewhat different from Taiwan's experience of Japanese colonialism. Hong Kong was undertaken solely for commercial reasons; the British in Hong Kong never embarked on the wholesale 'reform' of their colonial subjects, and were content to leave them to

themselves (except, of course, where their activities interfered with trade). By contrast, Japan decided to avoid becoming itself colonized by instead 'catching up with the West' (Ts'ai 2009: 23, quoting Kawashima 2004: 69), modernizing itself, and joining the colonial powers. Taiwan was Japan's first colony, and when it ceded control in 1945 after World War II it was also its last. However, at the time when Japan took control of Taiwan, Japan was barely ready to enter into the colonial enterprise. Lacking colonial experience, Japan framed its colonial model with reference to European ideas and practices, mapping out a security region in which it further developed its interest in overseas trade.

At the start of Japan's military takeover of Taiwan, several rebellions broke out across the island. As a result, Japan decided to keep Taiwan under military rule. There were three military Governor-Generals and constant fighting; this period has been called an 'age of mistakes and failure' (Lamley 1999: 205). The military administration did not resolve problems, but instead provoked further resistance. It was a very expensive time, both in terms of cost (for maintaining the police force) and also in terms of lives (lost from combat and disease).

There are similarities here with the situation in the New Territories. Until 1898, the villagers in the New Territories, administratively part of Xin'an County (新安縣), regarded themselves as part of Mainland China. Resenting their incorporation into the British colony, the larger Cantonese-speaking clans mobilized their members in armed resistance, in what Patrick Hase calls 'a small colonial war' (2008: 5). The British responded with force of arms, aided by a proclamation from the Viceroy of Canton exhorting the villagers to 'tremble and obey' and abide by the terms of the treaty (Hayes 2006: 8–9; Hase 2008: 41). Thereafter, the people of the New Territories often proved recalcitrant colonial subjects, and the Heung Yee Kuk (鄉議局, Rural Council) was established in 1926 as a statutory advisory body to negotiate with the colonial government and promote the welfare of the people of the New Territories. Although there were improved transport links through the century – the Kowloon Canton Railway (九廣鐵路) was built in 1910 – and the presence of many British soldiers, these areas remained marginal. Eventually, the British administration, in a further attempt at pacification pursuant to development in the 1950s, granted indigenous New Territories residents special rights. The 1984 Joint Declaration and the 1990 Basic Law also recognized the rights of indigenous residents (Ng with Baker 1983), who were defined as those who could trace their ancestry back to before British colonization.

Taiwan, meanwhile, for the first half of the century found itself part of an expanding colonial empire, as Japan moved into Korea in 1910 and Manchukuo in 1932, and eventually, in 1940, established the so-called 'Greater East Asia Co-prosperity Sphere' (大東亞共榮圈). However, Japan's policies reveal conflicting attitudes: Japan adopted the British system of governing the home country and the colony separately, but unlike Britain – which generally allowed its colonial subjects to retain their culture – Japan wanted to culturally re-engineer the inhabitants of Taiwan. After the Wushe Incident (霧社事件) of 1930, Japan employed the French colonial model and put greater emphasis on assimilation. Taiwanese subject-citizens were encouraged to adopt Japanese language and culture, and with the outbreak of the Second Sino-Japanese War in 1937, assimilation began to be enforced through the militarizing Kominka Movement (皇民化運動), which was imposed until the end of World War II.

By acquiring Taiwan as its first colonial territory, Japan formally joined the list of colonial powers. The task of colonizing Taiwan became a symbol for the nation of Japan, meaning that Japan was, from that moment, on an equal footing with Europe. Japan endeavoured to raise itself to the level of a 'civilized' country, and it tried to modernize its institutions in accordance with European models. At the same time, though, it made an appeal to the European colonial powers about her mission to 'civilize' Taiwan: European colonial empires and Japan adopted the same ideas to justify their colonial adventures, such as bringing the light of civilization to allegedly 'primitive' peoples. However, although some colonial actors had religious or humanitarian aims, the colonial powers' actual motive was to gain access to natural and human resources, and trade and profit.

This can be seen in the case of colonial Hong Kong. For almost the entire period of British rule, the administration adhered to the principles of liberal, *laissez-faire* economics and the related doctrine of the non-interference of government in social affairs. However, although in theory free market forces prevailed, in practice, cartels, corruption and cronyism distorted the operation of the economic sphere. Trade – including trade with China – remained the cardinal imperative of colonial rule. As far as London was concerned, colonies were meant to make money, or at least be self-sufficient. They were not meant to soak up funds. This partly explains London's reluctance to sanction spending on welfare and infrastructure, and the Hong Kong administration's emphasis on hard work and self-help as the route to success. In this regard, Hong Kong governance for much of the twentieth century closely echoed that of mid-Victorian Britain. Its tax system harked back even further, to the eighteenth century, favouring the accumulation of wealth and minimal government expenditure. The government's general indifference to social matters meant that those disadvantaged by the operation of the free market could expect no assistance, whilst those who benefited could depend upon politicians not to interfere in their more rapacious practices. Indeed, the government itself was entirely comprised of European and – from about the 1880s – Chinese men of commerce, whose interests, despite their ethnic differences, were often identical: trade, commerce and profit (Munn 2001). Dominant economic roles were played by British conglomerates (known as 'foreign hong' 洋行), such as Jardine, Matheson & Co. and Swire, local Chinese compradors such as Ho Tung (何東), who collaborated with the British, and local Chinese merchant families, such as the family of Lee (利氏家族), which owned extensive land in Causeway Bay, and the family of Li (李氏家族) which founded the Bank of East Asia in this period. By the 1960s, these close ties between business and government earned the government the nickname 'Hong Kong Inc'.

The co-option of the Chinese elite in the latter part of the nineteenth century provided not so much a counter-weight to the influence of the European elite as added ballast to its continued rule (Carroll 2005). Together, they formed a mercantilist – and later an industrial and financial – hegemonic class (Chan 1991; B.K.P. Leung 1996: 39). Particularistic ties amongst the political and business elites were mirrored in the underworld by triad-run criminal syndicates and syndicated police corruption. As such, from the 1880s onwards, they increasingly came into conflict with the 'coolie class' they exploited. Episodes of labour unrest and insurrection in the nineteenth and early twentieth centuries also reflected anti-foreign, pro-China sentiments, indicating a fragile or non-existent loyalty to Hong

Kong (Tsai 1993). Movements for political change on the Mainland drew support from the Hong Kong population, most notably during the 1911 Revolution. It is this and subsequent episodes of cross-border political alliances that colour today's Mainland government view of Hong Kong as a base for subversion.

By contrast, Taiwan had since the 1900s experienced a series of colonial reforms which sought to integrate Taiwan into the hierarchy of the colonial administrative mechanism and into a new web of economic relationships with Japan in the world capitalist system. A key feature of Japanese colonial rule from 1901 was administration through a centralized police force with the aid of the *hook* (保甲) system, which built upon natural settlements (i.e., neighbourhood units of ten to twenty households) serving as basic units for colonial administration (Ts'ai 2009: 93–118). Thus, a modern administrative system was established out of and rooted in age-old migration settlements for social control and economic development. For the first time, migration settlements and neighbourhood units were recognized as legal and political entities. This local system was further in line with the tradition of the county administration, which facilitated interaction between the state and local police force. As such, society and state were beginning to meet at the county level and by the 1920 Japan's rule over Taiwan delegated part of its power to local government in a way that followed Tokyo's 'extension of policies in Japan proper to colonies (*naichi encho* 內地延長)' (Ts'ai 2006: 98).

The modernization initiated by Liu Ming-chuan was expanded and consolidated: Japan set about road-building and developing railways; schools, postal and telegraphy facilities were established; and there was improved public health and sanitation, as well as more extensive hospitals. At the same time, agriculture and industry were improved; civil institutions were introduced; and mechanisms of law and order put in place. Japan also introduced newspapers, modern accounting, a banking system, and corporate enterprises. However, natural resources were squeezed out of Taiwan for the benefit of metropolitan Japan, in a process involving shifts in land ownership, the commodification of agriculture, and the emergence of a new wealthy and powerful capitalist class.

In particular, agriculture was reformed to meet Japan's consumption needs and to compete in the international market: Taiwanese farmers were gradually forced to shift from subsistence agriculture towards the production of goods for export (the three major exports – the so-called 'cash-crops' – were tea, sugar and camphor). There was also public investment in modernization, such as irrigation, improved seeds, fertilizers, and pesticides (Ka 1995: 61). Taiwan was indeed a laboratory of Japan's empire-building, and the experiment further evolved into the 'Greater East Asia Co-Prosperity Sphere' during the Pacific War.

Hong Kong also experienced Japanese rule, when the area was occupied from 1941–1945. One-and-a-half million people left the territory during this time, and others were forcibly repatriated to the Mainland (Baker 1993: 865). Many Hongkongers who returned to the Mainland fought the Japanese, while those who remained were exhorted by the Japanese to renounce their colonial identity and to regard themselves instead as members of the Greater East Asia Co-Prosperity Sphere, led by Japan. However, whilst members of the Chinese elite did collaborate with the Japanese, other Hongkongers joined forces with the British Army Aid Group to assist with gathering intelligence and rescuing prisoners of war. It was a sharp contrast: in Taiwan, Japan was using prisoners of war captured at



the surrenders of Hong Kong, Singapore, the Philippines and the Dutch East Indies as slaves for the Japanese war effort.

### **Post World War II and the Politics of Representation**

Hong Kong and Taiwan have also long been seen as places of transit, as regards people, goods/commodities, and money. Throughout the nineteenth and twentieth centuries, successive waves of migrants fled to Hong Kong or to Taiwan, or via both places to other areas of Southeast Asia, escaping political persecution, social upheaval, poverty and civil strife in Mainland China. In particular, there was large-scale immigration from China to both places after World War II: thousands who had fled to China from Hong Kong during wartime returned, accompanied by refugees fleeing the conflict between the Nationalist and Communist forces on the Mainland. Amongst these were Nationalist sympathizers en route to Taiwan; however, many simply stayed in Hong Kong, occupying Nationalist enclaves and squatter villages such as Tiu King Leng (調景嶺).

The then-ruling government in China – the Kuomintang (KMT, Chinese Nationalist Party) – retreated to Taiwan between 1947 and 1949, following the defeat of its forces on Mainland China at the end of the civil war with the Chinese Communist Party (CCP). The decision to give Taiwan to the KMT had been made by the Allies at the Cairo Conference of 1943 on the condition that the three nations (the ROC, US and UK) would fight alongside one another until Japan's surrender. Indeed, the Americans at this time had initially wanted the Nationalist government to be given control of Hong Kong too, due to reservations about the British resumption of colonial rule. However, with Mao's victory in 1949 and the establishment of the People's Republic of China (PRC), the geopolitical landscape radically altered. Overnight, Hong Kong became an important asset for Western powers in their defence against communism along the 'Bamboo Curtain'. The Treaty of San Francisco, which Japan signed in 1951, stated that 'Japan renounces all right, title, and claim to Formosa and the Pescadores', but it did not specify what Taiwan's legal status actually was. In the years that followed, the Americans and the British were opposed to Taiwan being taken over by the PRC's CCP, but they did not see Taiwan as a base for recovering Mainland China by the KMT either (for further information, see Wang 2014).

The KMT's ROC *de facto* had no authority beyond Taiwan, but the party continued to assert its position as the sole legitimate government of all China. It regarded itself as in temporary exile on Taiwan, and the island was imagined as a mere province of a much larger Republic (Rigger 2011: 136). Also, memories of the eight-year war against Japan were still fresh: in 1946, KMT officials who were sent to survey Taiwan had reported that people in Taiwan had been 'enslaved' as the outcome of fifty years of colonization by Japan (Chen 2002). In this way, a new distinct historical subject was defined: the *benshengren* 本省人 (provincial natives, or Taiwanese) seen as an 'ethnic group' with its own language, colonial history, and way of life (for further details, see Shih 2012).

The distinction between *benshengren* and Chinese Mainlanders was deepened by the 2-28 Incident, which broke out at the end of February 1947 (Edmondson 2002: 25). A *benshengren* widow who was selling untaxed cigarettes at a street stand had her goods and takings confiscated by KMT officials, one of whom also

pistol-whipped her. The surrounding crowd began to protest, and one man was killed as officials fired their guns into the crowd. This prompted further protests, which were met with machine-gun fire. As news of the killings was broadcast and spread across Taiwan, violence erupted island-wide. This was followed by an operation called 'village sweeping' (清鄉) across the island, in which village collaborators helped to track down wanted people who were in hiding. This resulted in many more members of the elite and young students educated during the Japanese colonial period being either killed on the streets or arrested and then executed (Fleischauer 2011).

The violence has since been framed as an instance of 'ethnic conflict', and those who fled from Mainland China (i.e., from the provinces other than Taiwan) at the end of Chinese civil war during October 1945 and February 1955 became known as *waishengren* 外省人 (provincial outsiders, or Mainlanders) (Corcuff 2002: 164). In the aftermath of the 2-28 Incident, martial law was introduced following a constitutional amendment called the 'Temporary Provisions Effective During the Period of Mobilization for the Suppression of Communist Rebellion' ('動員戡亂時期臨時條款'), which then led to the anti-Communist repression known as White Terror. Although making up around 13 percent of Taiwan's population, *waishengren* represented approximately 80 percent of the ruling class, civil service, and educational and military sectors (Corcuff 2002: 163). The category of *waishengren* was thus seen, in contrast to *benshengren*, as an 'ethnic' group, defined through the shared experience of fighting against Japan followed by Chinese civil war, and as a homogenous privileged class with an identity that looked forward to recovering China or re-unification.

In contrast, in Hong Kong, refugees' previous links to China provided some cultural anchorage to their places of origin, through their way of life. The majority were Cantonese-speakers from Guangdong, along with some merchants from Shanghai, as well as Mandarin-speaking intellectuals from the north. Political affiliations also played a role: some refugees identified with the Nationalist cause, while other refugees who fled to Hong Kong during the Cold War still clung to some forms of Communism, despite having fled the famine caused by the Great Leap Forward in 1962, the unrest of the Cultural Revolution from 1966–1976, or the 1989 Tiananmen Square massacre. As the prospect of sojourning somewhere else receded and a new generation came into existence, Hong Kong became 'home'. According to Hugh Baker, it was refugee migrants – at first sojourners, later settlers – who 'became the stuff of which Hong Kong Man was made' (1993: 865). This category of Hongkongers has thus also developed as a distinct historical subject, known as *Heunggongyahn* (Hongkongers 香港人), also defined in terms of an 'ethnic group' with its common features of exile from China, refugee experiences, British colonial rule, and particular ways of life.

Throughout the Cold War period, the KMT in Taiwan represented continuity with the Republican legacy in China, and promoted its version of Chinese culture in the so-called 'Chinese Cultural Renaissance Movement' (中華文化復興運動), which was presented as a contrast to the CCP's Cultural Revolution on the Mainland (Katz 2003: 402–405). This 're-Sinicization' policy was seen also as a de-Japanization campaign that was meant to wash away Taiwan's past and colonial history. It re-engineered Taiwan's supposed historical connection with Greater China, and also re-connected Taiwan with the supposed territory of early

twentieth-century China (as far as Outer Mongolia). Furthermore, by imposing the Beijing form of Mandarin as the national language (國語), the KMT suppressed other Chinese languages, such as Hoklo and Hakka, which had long before the KMT's arrival been used on a daily basis by *benshengren*. Indeed, the 're-Sinicization' policy was a kind of cultural colonialism imposed on ethnic Hoklo and Hakka groups. *Benshengren* languages were downgraded to the marginal status of patois and banned in the media and schools. The imperial centre-periphery dynamic re-appeared in the power relations between the ruling KMT *waishengren* and the ruled *benshengren*.

Again in contrast, as regard cultural policy, both the British government in London and its administration in Hong Kong were concerned to avoid any action – such as repression of cultural activities – which might provoke intervention in the colony by Communist China or Nationalist Taiwan. When the question of democracy was mooted, it was the Hong Kong elite that London heeded, rather than the voices of those clamouring for representation (Tsang 1988). Strict application of the rule of law was officially endorsed as a means of ensuring impartial treatment for all political groups. Though thousands were detained and deported for subversive activities, London urged tolerance and a low-key approach towards visiting Communist and Nationalist cultural groups.

This apparent tolerance of political activists, and of refugees' cultural distance, has been seen by some as providing a space within which various communities were able to carve out for themselves a sphere of existence distinct from their distant rulers. Lau and Kuan (1988: 191), for example, describe a minimally integrated social-political system which allowed the ethos of the Hong Kong Chinese to flourish. They point out (20) that, unlike other colonial subjects, the Chinese who came to Hong Kong were largely self-selected: that is, they opted to reside under a colonial government which had brought with it an administrative and physical infrastructure preferable to what they had experienced in China itself. This did not necessarily mean that British colonial government was therefore regarded as legitimate; Pro-China 'leftists' and nationalistic intellectuals both remembered that the British had arrived through invasions and unequal treaties, and agreed that colonial rule was consequently illegitimate. Indeed, such views were held by even ordinary Hong Kong people, with the exception of pro-British Chinese elites and the upper class. Colonial rule – which before the 1970s was quite unfair and authoritarian – was, though, accepted for practical reasons.

Thus there was a general acceptance of authority, and an attitude of 'utilitarianistic familism' (Lau and Kuan 1988: 20; Vickers and Kan 2005: 175). The non-interventionism of British colonialism was particularly marked in Hong Kong, due to the awareness that the colony may return to China; this may have appealed due to the traditional proclivity to keep government at arm's length. This absence of government from the daily lives of the population, Lau and Kuan hold, led to an alienation between the two, and a failure by government to provide a model of moral values. Describing a problem which is as true of contemporary Hong Kong as it was of the 1960s, the result was a 'lack of moral linkage' between the rulers and the ruled.

Indeed, as far as China and the British governments were concerned, Hong Kong had no identity or culture of its own. It was simply an economic city, its residents concerned principally with making money, eating, dancing and gambling.

Through 'community building' initiatives, and a re-iteration of the UK's commitment to the rule of law, the administration sought to convince Hong Kong people that the city was a better prospect than Communist China, to prevent the city 'turning red' and to attach the Chinese population to colonial rule without granting them universal suffrage.

However, the 1970s gradually saw the superpowers favour China (PRC) over Taiwan (ROC) at the United Nations and in international diplomacy, although Taiwan remained strategically central to the US presence in the Asia Pacific. For the British government in London, Taiwan was merely of marginal interest, although for the British administration in Hong Kong, the island remained a sensitive presence – the KMT had links with affiliated groups in Hong Kong, and throughout the period the British were under pressure to demonstrate even-handed treatment of Communist and Nationalist activists. The latter were repeatedly accused by Beijing of following a 'Two China' policy.

By the early 1970s, it was also clear in Taiwan that there was very little hope of recovering the Mainland, while there was increased dissatisfaction with the KMT's continually unmet but constitutionally required promise of democracy on the part both of *benshengren* and some *waishengren*. A token free-press magazine, *Free China Fortnightly* (自由中國半月刊), run by a *waishengren* named Lei Chen (雷震), began to criticize KMT authoritarian rule; further, a few Mainlanders and Taiwanese campaigned together for local elections and for the creation of an opposition party. Internal and external challenges both increased the pressure on the KMT to justify its claim to legitimacy by reforming the political and electoral system.

However, because opposition political parties were banned, opposition took the form of the *Dangwai* (Outside the KMT Party) movement. In 1979, the movement's leaders founded *Formosa* (美麗島雜誌) magazine as an island-wide platform for campaigning for democratic reform and raising awareness of the politics of representation. On 10 December 1979, it arranged a march in Kaohsiung in commemoration of International Human Rights Day, following which eight protest leaders were given long jail sentences (Denny 2003: 168–169). However, Amnesty International publicized their fate (Amnesty International 1980), and the KMT came under pressure from the US government and a lobby of exiled Taiwanese-Americans. Calls for democratic reform and Taiwanization gained momentum: the first major opposition party, the Democratic Progressive Party (the DPP), was formed in 1986 and legalized in 1989, while martial law was finally lifted in 1987.

Reform in Hong Kong took the form of managed change: the 1984 Sino-British Joint Declaration introduced a transitional period, at the end of which Hong Kong was to be transformed from a British colony into a Special Administrative Region (SAR) of China. The Declaration provided a framework – 'one country, two systems' – which it was hoped would ensure the continuation of what was seen as Hong Kong's 'way of life' after the 1997 handover to China. This framework has also been cited as a model for uniting Taiwan with China.

However, the Joint Declaration was permeated with what Yiu-Wai Chu (2013: 12–15) calls the 'misrecognition' of Hong Kong. The image of Hong Kong people to which it appealed was an older colonial conception of Hongkongers as apolitical seekers of wealth, *homo economicus* personified (Jones 1999: 49–50). Consequently, the Declaration included only limited protections for Hong Kong's

'way of life' after 1997. Both governments ignored signs of growing political activism and demands by Hong Kong people for a voice in their own affairs; since the 1960s, the demographic and cultural profile of the city had altered, and, as noted above, a younger generation born in Hong Kong began to claim the city as their home. Before the free flow of people between China and Hong Kong came to an end in 1950, there were very few permanent residents of Hong Kong who identified themselves as 'Hongkongers'; this changed for those who came of age in the 1970s, and who, inspired by the west, were influenced by modern universal values (e.g. democracy, human rights, and justice). This new generation participated in various student and social movements, such as the Protect Diaoyutai Movement (保釣運動), the Legalization of Chinese Language Movement (爭取中文合法化運動) and the movement that emerged in response to the Golden Jubilee School Corruption Incident (金禧事件). These movement leaders and activists, such as Szeto Wah (司徒華) and Cheung Man-kwong (張文光) later become the core members of the democracy movement in Hong Kong from the mid-1980s.

Britain attempted to give Hong Kong people political representation after the signing of the Joint Declaration, as part of the decolonization process. Indirectly elected legislative counsellors were introduced in 1985, and in 1988 there was a proposal, rejected by China, for direct elections. However, the June Fourth Incident was a catalyst for further democratic development in Hong Kong, as indicated in a pre-1997 slogan of 'Resist Communism with Democracy' ('民主拒共'). This trend consolidated the social and political distinction between Hong Kong – the 'city of law' – and Mainland China, where the government used armed force to repress protest. Combined with the growth of local Cantonese culture, June Fourth probably did more than any government strategy to promote a strong sense of local identity.

In an attempt to stave off capital-flight, calm fears, and stem mass emigration, the colonial government introduced a Bill of Rights, offering legal protections up to and after the 1997 retrocession. For a few years in the run-up to 1997, Hong Kong experienced an astonishing flourishing of human rights discourse and legal activism, all of which contributed further to its sense of itself as a 'city of law'. Since 1997, the popular belief in the rule of law as a core Hong Kong value has made it the lightning rod around which anxieties about the depredations of the Mainland authorities have clustered. China's attempts to re-shape Hong Kong's law and legal institutions have become major rallying points for anti-Mainland protests (Jones 2007).

Hong Kong scholars now agree that social, political and economic changes between the 1950s and 1970s laid the foundation for the emergence of a distinctive Hong Kong identity (Carroll 2007). Factors central to this hegemonic restructuring included: the introduction of the Independent Commission Against Corruption in 1974 to end backdoor means of enhancement; the substitution of legal rights for political rights, and of legal representation for political representation; and a renewed emphasis on the rule of law as the guarantor of a level playing-field and equal opportunities for all. Government embarked on a programme of dissolving old particularistic ties and associations, and creating instead a new sense of loyalty to and identification with Hong Kong. Furthermore,

the ideology of the rule of law successfully represented as fair, just and deserved the continuing structural inequities of an undemocratic society.

Hong Kong's sense of itself was also developed by the signing of the Sino-British Joint Declaration in 1984, and, after June Fourth, the Wilson 'Rose Garden' strategy of building new infrastructure (in particular, a new airport). Stephen Teo (2000) remarks that whilst Taiwan's Mandarin cinema prevailed in Hong Kong until the mid-1970s, thereafter there was a 'Cantonese Comeback'. Hong Kong films extolled populist values, native language, and by the 1980s social realist films were being made by local directors concerning Hong Kong society, the plight of displaced peoples and the experience of exile (Brett Erens 2000). Local writing, Canto-pop<sup>2</sup> and kung-fu flourished, assisted by a local television channel (TVB) that was created in 1967 (P.-K. Leung 2000). In the mid-1970s, songs such as 'Eiffel Tower above the Clouds' (鐵塔凌雲) and the theme song to the television series, 'Under the Lion Rock' (獅子山下) marked a significant turn towards local self-consciousness and an emotional sense of Hong Kong as 'our home'; the latter song was regarded almost as a 'regional anthem'. The Joint declaration and the June Fourth Incident intensified fears and anxieties about losing this 'home'.

By such means, Ping-Kwan Leung (2000) argues, cultural work has helped define and rethink Hong Kong's identity through the construction of various narratives about and images of the city. This burgeoning sense of identity survived the increased economic integration with the Mainland's economy in the 1980s, following the 'open door' reforms initiated by Deng Xiaoping in 1978, and Hong Kong's reinvention of itself as an international financial – rather than a manufacturing – centre in the 1980s and 1990s. Carroll notes that a 1985 survey showed that three-fifths of Hongkongers preferred to see themselves as Hongkongers rather than Chinese (Carroll 2007: 170)<sup>3</sup>. Nevertheless, they were excluded from the signing of the Joint Declaration between China and Britain. This was locally portrayed as Margaret Thatcher 'selling Hong Kong down the river', or as a traditional Chinese arranged marriage in which the bride had no say (Carroll 2007: 182).

Subsequent negotiations over the Basic Law, the new airport, and disputes about the post-1997 legal and political arrangements made the years between 1984 and 1997 times of heightened uncertainty and anxiety. Hongkongers were promised a high degree of autonomy and 'Hong Kong people ruling Hong Kong', under the somewhat amorphous 'One Country, Two Systems' formula, originally developed by Deng Xiaoping to facilitate Taiwan's re-incorporation into Mainland China. The prospect of being returned to China made Hongkongers hyper-vigilant about actual or potential incursions from the Mainland. The notion that the 'One Country, Two Systems' formula was a 'blueprint' for Taiwan also meant that Hong Kong was now regarded as a harbinger of Taiwan's fate.

In contrast, the 1990s in Taiwan saw a peaceful transition to democratic elections. *Benshengren* were from that time allowed to vote and stand for public office; the opposition DPP was born out of the civic struggle for political

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<sup>2</sup> Chu (2013) describes Canto-pop as music with lyrics written in standard modern Chinese but pronounced in Cantonese.

<sup>3</sup> In many cases this would have an ethnic-cultural label marking a distinction from other ethnic groups or foreigners in HK, and without any political or nationalistic connotation.

participation and voting rights that preceded this. On the other side, the ruling KMT sought to justify its legitimacy and was driven to reform itself and electoral system. As Shelly Rigger notes, 'in propaganda terms, local elections helped the ruling party support its claim to democracy. In practical terms,... by rewarding local politicians and factions who joined the ruling party, elections helped Taiwanese overcome their distrust of the KMT and become active in politics through the ruling party' (1999: 179–180). The first non-supplemental elections were held, respectively for the National Assembly and the Legislative Yuan, for the first time recognizing that delegates who nominally represented seats on the Chinese Mainland, and who had therefore remained in office for decades unchallenged, needed to be phased out. Nearly all of the newly-elected delegates represented Taiwan (Copper 1994: 23). In 1994, direct elections were brought in for the provincial governorship of Taiwan, and for the mayorship of Taipei and Kaohsiung; the first direct presidential election took place in 1996. Lee Teng-hui, who is a *benshengren* and also KMT member, was the first elected President of the ROC. With Lee's authorization, the 2-28 Incident and the White Terror were able to be commemorated in public, and the events therefore gained a certain degree of recognition leading to compensation (Shih 2014). Between 2000 and 2008, an opposition DDP member, Chen Shui-bian, was elected as the first non-KMT President of the ROC. As such, a two party system was in this way established in Taiwan. In 2008, another KMT politician, Ma Ying-jeou, won the Presidency with 58.45 per cent of the popular vote and was re-elected in 2012 with 51.60 per cent.

After 2000, Hong Kong became a 'city of protests'. As discontent mounted about livelihood issues, poor governance, interference by Beijing, and tycoon-government cronyism, Hongkongers' sense of identity and what constituted their 'core values' grew. There were protests against the demolition of old colonial sites at the Star Ferry and Queen's Pier, which were partly against the government's 'raze and re-develop' priorities which favoured commercial interests, and partly a defence of iconic symbols of Hong Kong's identity (Cartier 2011). The First of July, the anniversary of the handover, became a ritual day of protest. Even so, the 2003 July First demonstration of over 500,000 people was a watershed moment in Hong Kong history. The target was Beijing's insistence that Hong Kong implement Article 23 of the Basic Law, which stipulated the introduction of anti-subversion laws. The demonstration alarmed Beijing and, though the Hong Kong government withdrew the proposal in the face of public opposition, Mainland pressure to re-introduce the laws remained. In the aftermath of the July First march, Beijing also pushed for greater patriotic education of Hongkongers and tightened its politico-administrative grip on the HKSAR.

Such measures to promote patriotism were castigated locally: They produced a public backlash which, in 2012, culminated in large scale anti-government protests. As with the controversy over Article 23, the government was eventually forced to withdraw its proposals for a National and Moral Education curriculum in the face of overwhelming public hostility (Bradsher 2012). There was also growing anti-Mainland feeling, principally against a flood of Mainland tourists permitted to enter the HKSAR following the Closer Economic Partnership Arrangement (CEPA) introduced by Beijing in 2003. Intended to support Hong Kong in the wake of the Asian financial crisis and SARS, this economic integration is now viewed by Hongkongers as a Trojan Horse through which Beijing can infiltrate the territory. In

recent months, Hongkongers have pointed to their fate as a warning to the people of Taiwan, whose government is embarking upon similar economic arrangements with Beijing.

In the final years of colonial rule, the last British Governor, Chris Patten, extolled the rule of law as Hong Kong's foundation stone, the guarantor of Hongkongers' liberty and freedoms. The Bill of Rights, introduced in 1991, consolidated these promises. Fears that Beijing would seek to undermine these liberties have been ever-present – Patten warned Hong Kong people that they might have to 'stand up' for their rights if this should happen. Increasingly, this is what has transpired. Throughout the mid-2000s, further National People's Congress Standing Committee (NPCSC) interventions in the operation of the legal system followed, leading to claims that the rule of law was dead in Hong Kong. Some of the clashes centred on the issue how the basic Law's provisions about universal suffrage, promised in the Basic Law but never delivered, should be interpreted. In 2004, the NPCSC declared that direct elections for the Chief Executive or Legislative Council violated the Basic Law, reneging on the understanding that this would be in place for the 2007 elections. In 2013, the issue remained controversial, as Beijing sought to back-peddle on the promise of universal suffrage.

There is now in Hong Kong a new generation of activists, too young to have clear memories of British rule, whose critical politics is less a legacy of British colonialism than of Mainland mishandling of Hong Kong affairs. For these young activists, the social, political and economic conflicts since 1997 have led to wholesale disillusion with the 'One Country, Two Systems' formula, and they have joined forces with more established groups to resist 'Mainlandization'. Their often fluid, fleeting, and unconventional political activities regularly wrong-foot the HKSAR administration and capture public attention. Meanwhile, the 'Occupy Central' civil movement for universal suffrage and social media websites frequently call upon Taiwanese to heed Hong Kong's fate after re-integration. In asserting their own identity as separate from that of the Mainland, Hongkongers increasingly perceive their fate as linked to that of Taiwan.

In March and April 2014, Taiwan's Sunflower Movement saw civic occupation and protest against the ratification of the Cross-Strait Services Trade Agreement (CSSTA) with China. Their demonstrations caught political observers by surprise, in part because the protestors utilized tactics by so-called Occupy protestors that were previously seen in New York and Madrid: they occupied buildings, blocked roads and utilized social media. On 17 March, the KMT government forced the CSSTA through the KMT-majority legislature with hardly any review; the speed with which it went through can be contrasted with the subsequent controversy and ongoing debate that erupted in Taiwan's society. The CSSTA will bring about monumental changes: in particular, it will further open Taiwan's service market to China, in up to 64 categories of industries. These include education, retail, transportation, telecommunication, and cultural industries (for further information, see Harrison 2014). The passing of the CSSTA will have a significant impact on the livelihoods of ordinary Taiwanese people in various sectors; in particular, it may cause serious damage to Taiwan's economic autonomy, and some suggest it will also be detrimental to freedom of speech, and even national sovereignty. It thus has the potential to alter Taiwan's character and democratic achievements fundamentally; yet such a critical decision for Taiwan's future was rushed through



the legislature in a manner that many believe violates the principles of democratic transparency and accountability. Meanwhile, President Ma's approval rating dropped to less than 10 per cent, making the issue a question of his and his party's ongoing political legitimacy.

The Sunflower Movement merged more than 50 civic organizations in Taiwan, all of which agreed to transcend their differences to fight for a common cause. As Michael Cole (2014) notes, although the campaigners did not succeed in forcing the KMT to change its policy, they nevertheless succeeded in making the CSSTA and the failing governmental mechanisms into a national issue, and even an international one. It is now clear that the impact of the Sunflower Movement has extended beyond Taiwan, serving as an inspiration for other campaigning groups; in particular, there have been growing exchanges between Taiwan, Hong Kong and elsewhere among likeminded youth and organizations.

### **Conclusion**

Hong Kong and Taiwan were both regarded by Chinese Imperial courts dismissively, and they became of interest to Han Chinese mainly in the context of resistance to non-Han rule over the Mainland. Both locations were thus viewed as potentially subversive, and they were only brought under imperial authority to prevent them from becoming further sources of unrest.

The centre-periphery dynamic that dominated Taiwan in the Imperial period can also be seen in the power relations between the ruling KMT Mainlanders and the Taiwanese after 1945. During the 1970s and 1980s, the 'Outside the KMT Party' movement sought to radicalize opposition to KMT authoritarian rule, and also gave momentum to calls for democratic reform and Taiwanization. In the 1990s, Taiwan became the first Chinese polity to become democratic, following the end of martial law and one-party rule. The politics of Taiwanese identity has since that time played an important role in Taiwan's democracy.

In Hong Kong, the British colonial government's policy was to emphasize rule of law, in an attempt to ensure that neither Communists nor Nationalists would predominate. This has sometimes led to the portrayal of Hong Kong as apolitical, or of British rule as impartial, but the colonial situation was of course saturated with political and commercial interests of various kinds and it is hard to see how a colonial administration could ever be 'impartial'. However, from the 1960s a younger generation born in Hong Kong began to claim the city as their home, and the socio-political and economic changes of the 1960s and 1970s laid the foundation for the emergence of a distinctive Hong Kong identity based in particular in forms of popular culture such as film and music. As the British implemented decolonization in other regions of the Empire, Hong Kong remained in a political limbo, caught between the desire of Beijing for 'unification', and in London for a peaceful way out. The Joint Declaration of 1984 made limited guarantees about the Hong Kong 'way of life', while setting in motion a timetable for limited political reforms. The interpretation of that document has, however, fuelled on-going political protests by Hongkongers seeking greater political autonomy from the perceived anarchy of the Mainland.

In both locations, long histories of settlement, evacuation and re-settlement in contexts of war, conflict and resistance have driven the inhabitants to emphasize

particular senses of self, and thus of identity. These in turn are bound up with particular values, such as democracy in Taiwan and the rule of law in Hong Kong. The so-called 'ethnic' identities, such as *benshengren* in Taiwan and *Heunggongyahn* in Hong Kong, have emerged as new markers of difference over the last two or one decades; they challenge the very concept of 'the Chinese', and the result has been a politics based around representations of culture and language and competing identities. As such, following Helen Siu, 'the term "Chineseness" is not an immutable set of beliefs and practices, but a process which captures a wide range of emotions and states of being. It is a civilization, a place, a polity, a history, and a people who acquire identities through association with these characteristics' (1994:19). This observation – that identity is something fluid, negotiated, constructed and acquired, and that particular identities have emerged out of social, political and economic relationships – is one which, as this Special Issue attests, remains pertinent to contemporary debates over history, languages, human rights, and the politics of representation in Hong Kong and in Taiwan.

It is therefore hoped that this Special Issue's comparative perspective will contribute towards understanding the processes that are involved with the transition to a representative political system in Hong Kong and the consolidation of democratic culture in Taiwan. Included here are essays as well as related commentary pieces and book reviews. Carol Jones explores law, society and culture in post-1997 Hong Kong, while Bruce Jacobs presents some hypotheses about how Taiwan's colonial experiences relate to the development of ethnic identities. Also on identities, Fu-Chang Wang looks at the development of Holo identity in contemporary Taiwan, while Malte Kaeding compares the role of Taiwan's social movements and perceptions of post-handover Hong Kong in the context of Hongkongization. Civil society movements are examined through a study by Simona Grano of movements in opposition to nuclear energy. Commentary pieces look at Hong Kong as a prototype of Taiwan for reunification, and at the notion of Taiwan as 'liminal' (the last in response to an essay on liminality that appeared in the previous volume of this journal). There is also a substantive review essay by Allen Chun that explores differences between Taiwan and Hong Kong by placing recent academic writing about the two locations side by side.

Before ending, there are two further ideas to develop from this introductory discussion: the first is that of multiple forms of Chinese-ness. One might ask why these different forms – for example those to be found in Hong Kong, Taiwan, and China – are valued so differently. The second related idea is that these different forms of identity also have their own developing processes and histories. In this Special Issue the authors go some way in demonstrating how senses of identity are formed historically, often in moments of conflict, and are invented or fabricated with whatever comes to hand. When we see that identities – *our* identities – are 'things' that we ourselves have fashioned in the course of our pasts and histories, then we can appreciate that identity is surely not only associated with the grand project of nation-building, but is actually something rather less monumental and essential. The processes of sharing common pasts and memories are more fragile, but also more precious. As such, rather than being a comprehensive comparison of both locations, this selection of essays aims to make a small contribution to

debates and research particularly over issues of Taiwanization and Hongkongization, as well as of struggles for democracy and politics of representation.

### Acknowledgements

We would like to thank Paul-François Tremlett and Ivan Hon for their comments on earlier drafts of this essay.

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