

Resistance to alien rule in Taiwan and Korea*

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ABSTRACT. Although alien rule is widely assumed to be illegitimate, nationalist resistance to it varies across time and space. This article explores why there was greater nationalist resistance to Japanese colonial rule in Korea than Taiwan from the turn of the twentieth century to the end of World War II. Resistance to alien rulers requires both a supply of participants in nationalist collective action and a demand for national self-determination. The article assesses two principal propositions: (1) that the supply of participants increases to the degree that native elites are stripped of their traditional authority and offered few incentives to collaborate; and (2) that the demand for national self-determination decreases to the degree that alien rule is fair and effective. A comparative analysis of the effects of Japanese alien rule in Taiwan and Korea suggests that nationalist resistance is greater in the earliest phases of occupation, that the greater native elites' opportunities, the weaker the resistance to alien rule; and that the fairer the governance, the weaker the resistance to alien rule.

KEYWORDS: collective action, indirect rule, Japanese colonialism, legitimacy, nationalism, occupation regimes.

The bungled American occupation of Iraq has rekindled a scholarly debate about the effects of alien rule on native populations. Until recently in modern history, alien rule was regarded as commonplace, but following the League of Nations conference at Versailles, all this began to change. The norm of national self-determination – first espoused as a progressive, if destabilising, by-product of the revolution in France (Kedourie 1960) – was upheld at Versailles as a universal ideal (Hechter and Borland 2001) and later enshrined in the United Nations Charter (Article 1 (2)). Less than a decade later, a cascade of anti-colonial liberation movements swept across the globe.

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Detailing the many depredations of alien rule for native populations became a booming academic industry, one which has garnered a great deal of empirical support (Cooper 2002, 2005; Calhoun et al. 2006). At the same time, the rapid development of the Southeast Asian Tigers and Ireland has often been attributed to these countries' self-determination. All in all, alien rule seemed to be a dead letter.

But is it really? After all, some modern instances of alien rule, such as the American occupation of Japan or the Allied occupation of Germany, have met with notable success. Further, self-determination evidently has not worked its miracles in many parts of the world. The list of egregious native rulers in the contemporary world is depressingly long. The imposition of alien rule, in the form of neo-trusteeship, has been advocated as a solution to the growing problem of failed states and the threat they pose to international order (Fearon and Laitin 2004). Some recent analysts have claimed that by offering access to modern institutions and technology, colonialism often provided the colonies with net benefits (Lal 2004; Mitchener and Weidenmier 2005; Ferguson and Schularick 2006). These considerations suggest that any blanket assessment of alien rule is likely to mislead.

This article explores the conditions responsible for resistance to alien rule by comparing the reactions to Japanese alien rule in Taiwan and Korea from the late nineteenth to the mid-twentieth centuries. This comparison is interesting because these countries have many common features, yet had markedly different levels of nationalist resistance.

Explaining resistance to alien rule

Resistance to alien rule in any given society is an outcome due to both historically specific and general factors. The present article applies a general theory of collective action to the problem of resistance; as such, it cannot hope to do justice to the idiosyncratic factors at play in either Taiwan or Korea. While analyses rooted in general theory lack fine-grained historical detail, they are also much more generalisable to other cases of alien rule. As social scientists, this is a trade-off that we accept willingly.

Resistance to alien rule is affected by the supply of participants and the demand for regime change. Supply factors consist of the conditions that affect individuals' capacity to engage in collective action. Most resistance to rule is not spontaneous; it flows from organisations and their leaders. One part of the native population is particularly able and prone to mobilise resistance: native authorities who have been displaced by the occupying power. These individuals, and the groups that depend on them, generally engage in the most violent forms of resistance to alien rule (Petersen 2002). In the case of Taiwan and Korea, the supply of participants was affected by both initial differences between the two countries and by Japanese colonial policies that determined the strength of native elites and the recruitment of collaborators.

By contrast, the demand for change is determined by the efficacy of regime governance.¹ To the extent that a regime is legitimate, it reaps compliance without resort to repression. Recent attempts to devise a positive theory of legitimacy (Jennings and Van Deth 1990; Levi and Sacks 2006; Tyler 2006; Lake 2007; Hechter in press b) conclude that the legitimacy of any regime – whether native or alien – is enhanced by governance that is fair, characterised by procedural justice and due process, and that effectively produces an appropriate basket of public goods. Our article explores the economic, cultural and political consequences of Japanese rule in Taiwan and Korea and suggests the motives for collective action against the alien ruler.

In its initial phase, military occupation is feared by natives because it augurs pervasive uncertainty and the risk of significant loss. Since individuals are highly sensitive to the prospect of loss (Kahneman and Tversky 1982), many people flee the approach of an occupying army. They fear that the alien's justice will rule their land, much to their detriment. For native elites, occupation often implies a loss of authority. For such reasons, resistance to military occupation is likely to peak in the initial stage of occupation. After a while much of this uncertainty is resolved, and the individuals who advance themselves by collaborating with the alien ruler – thereby serving as indirect rulers (Hechter 2000) – may provide a base of support within the native community.

On theoretical grounds, therefore, we expect that (1) resistance to alien rule should be high in the initial phase of occupation, except when preceded by the surrender of a national army, (2) the greater the opportunities afforded to native elites by the new regime, the weaker the resistance to alien rule,² and (3) the less fair and effective the alien regime is, the lower its legitimacy and greater the resistance to its rule.

To assess these propositions, we first examine the differing levels of resistance between Taiwan and Korea to Japanese colonial rule. This analysis leads to the conclusion that resistance was greater in Korea than Taiwan. Following this discussion, we assess alternative arguments accounting for variation in resistance to Japanese colonial rule between Korea and Taiwan. We then discuss the factors affecting the supply of participants for collective action, paying particular attention to elite collaborators in Taiwan and Korea. Next, we turn to demand factors, discussing the effects of alien rule on the respective social structures, cultures, economies and governments of the two territories. The conclusion summarises the reasons for greater Korean resistance.

Resistance to Japanese colonial rule in Taiwan and Korea³

Following the Treaty of Shimonoseki ceding Taiwan to Japan, the new Japanese colonial rulers faced an armed resistance by remnant military forces from the Chinese mainland. After five months of effort, this armed resistance

was neutralised (Lamley 1970: 25), but the fighting was not over. Guerilla bands led by a congeries of prominent civilians, criminals, and outcasts (Lamley 2007: 207) challenged Japanese authority. From 1895 to 1902, there were over 8,000 confrontations between locals and the colonial troops (Chou 1989: 285). For the most part, this resistance was not couched in nationalist terms; many of the leaders of these groups simply opposed any state, be it Chinese or Japanese, that sought to penetrate their redoubts (Katz 2005: 55).

The Japanese colonial administration overcame these challenges with brutal force. Over 6,000 (and as many as 14,000) Taiwanese were killed in the first six months of occupation (Roy 2003: 35), and some 12,000 were slain from 1898 to 1902 (Lamley 2007: 207). By the end of 1897, the Japanese government brought in additional manpower from Japan, including 250 police officers, 3,100 policemen, 664 military officers and 3,375 soldiers (Chou 1989: 122). Over 4,600 Taiwanese were deemed bandits and received the death penalty, and thousands of others were killed without due process (Chou 1989: 180).

The Taiwanese gradually learned the futility of violent resistance and the importance of bargaining with the Japanese colonial administration (Fulda 2002: 364; Roy 2003: 47). Much Taiwanese resistance to alien rule eroded: from 1900 to 1910, there were only ten major disturbances (Kerr 1974: 107–8). The final two guerilla uprisings occurred in 1915. Aside from a violent aboriginal uprising against the Japanese occupation in 1930 (the Wushe Incident), all organised armed resistance to the occupying authority ceased (Lamley 2007: 220, 224).

In the 1920s, newly formed Taiwanese political organisations began to demand racial equality and home rule (Chen 1972: 477), but the Taiwanese never pressed for independence from Japan. Political groups merely called for a separate and equitable standing for Taiwan within the Japanese empire (Lamley 2007: 233). Throughout the decade of the 1930s, Taiwan was so peaceful that the British Consulate's annual reports repeatedly remarked that 'there is absolutely no reason for imagining that there is any degree of discontent, which could possibly be dangerous' (Annual Report on the Island of Formosa 1997: 610–11).

Korea proved to be a very different story. The Japanese military murdered the Korean queen in 1895 sparking the formation of the Righteous Army – an armed, anti-Japanese movement. The initial resistance was put down by the Japanese troops, but after the Korean emperor was dethroned in 1907, the resistance re-emerged and grew into a broad-based movement that included the elites, the intelligentsia and the local peasantry. In 1908, there were 1,451 armed engagements involving 69,832 men; 2 years later following ruthless repression by the Japanese military, there were only 147 totaling 1,892 men. By August 1910, when Japan officially annexed Korea, armed resistance had already been effectively quelled (Ku 1985: 3). Resistance to Japanese colonial rule was forced underground: secret societies and private schools became important venues for nationalist activity (Lee 1963: 97).

Korean resistance to alien rule boiled over in 1919. Nationalists took advantage of the funeral of the former emperor to stage a major demonstration in Seoul (Brudnoy 1970: 169). On 1 March, 3000 copies of a Korean declaration of independence, signed by thirty-three leaders from a variety of religious and underground nationalist groups, were distributed to a crowd (Ku 1985: 65–6). Korean flags, fashioned in secret, were waved, and thousands of Koreans took to the streets. Concurrent demonstrations were organised in seven other cities, including Pyongyang (Ku 1985: 68–9). Mass protest continued on a country-wide scale throughout the month of March. These demonstrations became truly national in character and lasted into April, with an average of fifteen protests a day throughout the peninsula. At least 460,000 Koreans participated in the movement in these 2 months, despite arrests. Korean estimates suggest that there were two million participants; Japanese estimates place it at one million (Lee 1963: 114; Ku 1985: 72–3). The movement was only finally subdued when the Japanese government sent six battalions of infantry and 400 gendarmes to Korea. They resorted to measures including torture and flogging (Ku 1985: 103–9), and Japanese colonial authorities killed and arrested thousands from all regions of the country (Lee 1963: 115–18).

The brutal repression of the March First Movement sent a powerful message to the Korean nationalists. Nearly all of the movement's leaders were imprisoned or exiled. Japanese authorities suppressed all lectures, publications, and street demonstrations that they deemed to be anti-Japanese. Aside from a few isolated violent incidents, the two most important uprisings against the Japanese colonial rule after the March First Movement were the Six Ten and Kwangchoo Incidents. The first uprising emerged out of an imperial funeral procession of over 400,000 Koreans, which morphed into a nationalist protest (Dong 1965: 289). The uprising was suppressed before it could spread to the rest of the country, however. The second incident lasted for 5 months and involved as many as 54,000 Korean students who were outraged by Japanese policies in Korea, and motivated more by resentment than nationalist demands (Dong 1965: 290–1).

Despite this repression, Japanese colonial policies under the new mandate allowed for alternative means of mobilising resistance through newspapers, radio and voluntary associations. Nationalists concentrated their efforts in education, stressing the importance of maintaining Korean culture and national consciousness in the face of increasing assimilation attempts by the Japanese authorities (Lee 1963: 238–46).

The Korean communists were most successful at organising internal resistance. Emboldened by the Bolshevik Revolution, they helped organise more than 330 large strikes and many smaller ones involving tens of thousands of workers between 1920 and 1925, and 900 strikes involving 70,000 workers between 1931 and 1935. These strikes are particularly impressive since nearly 453,000 Korean strikers were arrested between 1932 and 1935 (Simons 1995: 140, 144). The communists also engaged in

insurgency, such as Kim Il Sung's raids against Japanese outposts on Korea's northern border (Buzo 2002: 46; Simons 1995: 142–4)

Korea's greater resistance to alien rule is further borne out by considering evidence on trends in policing (see Figure 1).

Figure 1 reveals a sharp drop in the ratio of police per capita in Taiwan from 1895 to 1905, and a very modest upswing thereafter. The Korean pattern is quite different: the ratio increases steadily until 1945. This expansion of policing is an indirect measure of resistance to Japanese colonial rule. Likewise, the number of Koreans convicted for political offences rises consistently from 1922 to 1931 (Dong 1965: Figure 8), and the number of such cases brought to trial rises from 1936 to 1943 (Dong 1965: Figure 9).

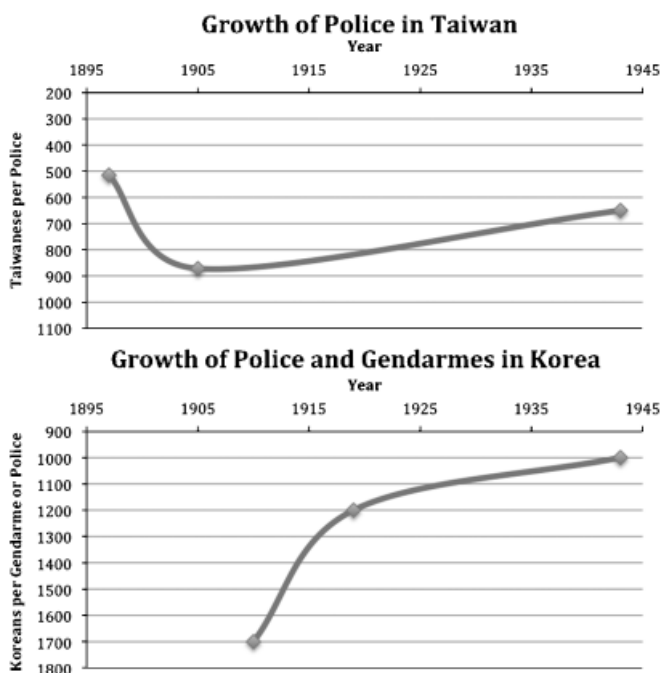


Figure 1. Policing in Korea and Taiwan, 1895–1945. Figures for Taiwanese or Koreans per police force were obtained by dividing the total population by the total number of police to obtain a measure of police density in each country. To obtain these figures, population data for Korea was obtained from Trewartha and Zelinsky (1955: 4). Population data for Taiwan was obtained from Taeuber (1961: 102). Data for the number of police forces in Taiwan for 1897 and 1905 was obtained from Takekoshi (1907: 148–9). Data for the number of police forces in 1910 and 1919 was obtained from Ku (1985: 13). Finally, data for the number of police in both Taiwan and Korea in 1943 was obtained from Chen (1970: 147–8).

Although Taiwan experienced twenty years of guerilla insurgency, the conflicts were local rather than national in scale. The absence of an aboriginal state in Taiwan meant that no treaty could be signed between the Japanese government and the aboriginal population. The political disunity of the aborigines compelled the Japanese colonial administration to engage in counterinsurgency against each group resisting central control. Once the local insurgencies were subdued in 1915, there is little further evidence of resistance to Japanese rule in Taiwan.

Rates of military volunteering are consistent with this assessment of differential resistance to alien rule. Whereas 15,000 Koreans volunteered for service in the Japanese armed forces in 1938 (Kim 2005: 138), hundreds of thousands of Taiwanese had volunteered by 1942 (Lamley 2007: 241).

Finally, the present-day reaction to the collaborators of yore is quite different in the two countries. Under a special law enacted in 2005, the South Korean government established an Investigative Commission on Pro-Japanese Collaborators' Property. On 3 May 2007, the government confiscated property (worth \$3.9 million) of the descendants of nine Korean collaborators who had received court titles and money from Tokyo (*New York Times* 2007). So far, the Commission has listed 452 collaborators, and more confiscation is planned in the future. No comparable action has been taken by the Taiwanese government.

Overall, therefore, resistance to Japanese colonial rule was markedly greater in Korea than Taiwan. What accounts for this differential response?

Alternative explanations

Admittedly, the comparison falls short of the requirements of a crucial experiment. To some extent, stronger Korean resistance to Japanese rule may stem from differences between the countries at the onset of Japanese rule. First, due to *geography and topography*, Japan had distinct strategic interests in Taiwan and Korea. Whereas Korea was a beachhead for military expansion in Asia, Taiwan had less strategic importance. Although this led to somewhat different governance policies, for the most part both countries suffered similar levels of political repression at the hands of the Japanese. Thus, geographical differences alone cannot explain why resistance to Japanese rule was stronger in Korea than Taiwan.

Second is the issue of *duration*. Japan's occupation of Taiwan began fifteen years before Korea's, and this too might have weakened resistance by affording greater scope to Japanese colonial efforts to assimilate the Taiwanese. However, there is less to this argument than meets the eye. Although Korea only became an official Japanese colony in 1910, Japanese occupational involvement began well before that date. Japanese troops were spurring resistance in the peninsula as early as 1895 (Schmid 2002: 44). By 1905 Japan declared Korea a protectorate, assuming control of its foreign affairs. Prior to

annexation, the Japanese government forced the Korean emperor to abdicate, installed his son as emperor, and disbanded the Korean army (Robinson 1988: 37). So the duration of alien rule cannot be the answer.

The most popular explanation for the variation in resistance levels is that Korea's history of statehood and consequent *national identity* provided organisational and ideological bases for the development of a nationalist movement.⁴ Unlike Taiwan, Korea had been an independent state for millennia. The Joseon Dynasty, overthrown by the Japanese government, had been established in the late fourteenth century. In contrast, Taiwan had already experienced bouts of alien rule at the hands of the Chinese, Dutch, and Spanish. There can be no doubt that Korean national identity was stronger than Taiwanese (McNamara 1986). However, a Taiwanese identity was beginning to emerge at the end of the nineteenth century.⁵ The Han Chinese, by this period the majority in Taiwan, were beginning to identify as Taiwanese, and the emerging school system had Taiwanese, not Mandarin, as the teaching language (Fujii 2006: 67). Further, Korean nationalism only emerged at the end of the nineteenth century (Eckert 1991; Shin 2006; Wu 2003; Robinson 2007); it was primarily a reaction to external pressures and imperialism (Lee 1963: 47, 51; Eckert 1991: 226; Schmid 2002: 5), and the nationalist movement did not crystallise until the Japanese Empire assumed control (Robinson 1988: 3; Rhee 2001: 142, 201; Schmid 2002: 32).

All told, initial conditions account neither for the timing nor the intensity of resistance in these countries. In both Taiwan and Korea, resistance peaked soon after the Japanese colonial administration assumed control. To account for the temporal variation in the intensity of resistance, the demand for regime change and the supply of nationalist leaders must be considered independently.

Supply factors: rebels and collaborators

Resistance to alien rule is a function of supply of participants and the demand for regime change. In the case of Taiwan and Korea, supply factors played a major role in determining resistance to Japanese rule. Two particular factors stand out: the difference in the native social structures during the period of alien rule, and the varying levels of native collaboration.

Social structure

The gentry in Taiwan was small and weak relative to its Korean counterpart, and many Taiwanese elites emigrated to China immediately after the Japanese takeover. The Treaty of Shimonoseki (Article 5) stipulated that for 2 years the ethnic Chinese residents of Taiwan had the option of leaving the island and immigrating to mainland China, or remaining on the island and becoming Japanese subjects. Some estimates put the number of emigrants at a few

thousand (Chu and Lin 2001: 106); others suggest that about a quarter of the Taiwanese population took advantage of the exit option (Roy 2003: 34; Lamley 2007: 208).

Taiwanese emigrants were primarily wealthy and from the upper gentry (Chou 1989: 308; Lamley 2007: 208). Their exodus deprived Taiwan of much of the potential leadership of a nationalist movement. The status of the remaining gentry – who by virtue of their degrees, titles, and classical education had enjoyed high privilege under Qing rule – declined under Japanese rule (Chou 1996: 44).⁶ In contrast, at the onset of Japanese colonial rule Korea was highly polarised; it boasted a well-entrenched elite – the *yangban* – with centuries of aristocratic legitimation (Cumings 2005: 151). The *yangban*, consisting of the top ten per cent of the population, were prohibited from engaging in any pursuit other than public service (Breen 1998: 87). They monopolised positions in the government and military establishment.

After the abdication of Emperor Kojong in 1907, a group of *yangban*-led guerillas formed to repel the impending Japanese colonial conquest (Breen 1998: 103). By the time Japan assumed control in Korea in 1910, most of these insurgents had fled to Manchuria (Cumings 2005: 146). The remaining Korean elite had nowhere to go without suffering an enormous loss of status. Whereas the majority of Taiwanese elite could maintain their status by emigrating to China, the bulk of the Korean elite stayed on the peninsula where it became subject to the will of the Japanese colonial administration. This difference in patterns of elite exit had major consequences for the course of resistance to alien rule in these two lands.

Collaboration

To the (usually very real) degree that alien rulers are resented by native populations, their costs of control must be correspondingly higher than those of native rulers. How can these surplus costs ever be borne? The answer lies in the use of native intermediaries who collaborate with the alien power to govern the native population (Robinson 1972; Lammers 1988). Collaborators are essential because occupation regimes, like their colonial counterparts, always aim to rule on the cheap. Since they depend on collaborators to provide social order, it is not in the interest of alien rulers to undercut their authority.

Why do natives collaborate with an oft-hated alien ruler? As Max Weber (1994: 93) suggests, many government bureaucrats continue to work for alien rulers because they see their jobs as apolitical and have no desire to deprive their fellow citizens of essential services (health, sanitation, utilities, and so forth). Alien rulers seek to employ native leaders for their specialised skills – in realms such as governance, security, and cultural production – and because they are already endowed with at least a modicum of legitimacy. Both assets are valuable for the maintenance of order under the new regime. In the best of circumstances, they can serve as indirect rulers (Hechter 2000). If native elites

are not sufficiently rewarded by the new regime, however, they are likely to foment opposition to it. Accordingly, the leaders of nationalist movements often come from the ranks of discontented elements of the native elites and intelligentsia (Hroch 1985).

The Japanese colonial administration sought to build an elite-driven regime in Taiwan that provided social order at minimal cost (Chu and Lin 2001: 105). At the onset of Japanese colonial rule, a motley group of local leaders and others cooperated with the regime primarily to protect their neighborhoods and villages from armed conflict (Lamley 2007: 215). After the first few months of turmoil, some merchants and gentry joined the ranks of collaborators. By rewarding these Taiwanese notables for their wealth, social status, or community service the Japanese colonial officers gradually succeeded in inducing more reputable and ambitious Taiwanese to collaborate (Lamley 2007: 215–6). By the end of the Japanese colonisation, at least 36,000 Taiwanese officials were employed in the Japanese colonial bureaucracy (Chao and Myers 1998: 21).

The Japanese colonial administration provided a variety of incentives to foster collaboration. These included a conference inviting the Taiwanese gentry to participate in the cultural transformations and in the ‘new learning’ promoted by Japan (Lamley 2007: 216) and the awarding of gentleman’s medals to cooperative elites (Chu and Lin 2001: 106; Roy 2003:45). The gentry were given economic incentives and business privileges (Roy 2003: 45), and many Taiwanese were allowed to enroll in universities in Japan (Fulda 2002). Some of the Taiwanese educated under Japanese colonial rule joined voluntary associations to end customs, such as foot-binding and queue-wearing, that Japanese society regarded as retrograde (Lamley 2007: 218). Despite their initial clashes with the aborigines, the Japanese regime eventually also helped the aborigines to obtain education and jobs, turning them into some of the most loyal warriors of the Japanese empire (Chu and Lin 2001: 110–11).

On assuming power in both countries, the Japanese colonial administrations instituted land reform (Myers and Yamada 1984: 428–9). The impact of this land reform, however, was different in Taiwan than in Korea. In Taiwan, Qing rule between 1684 and 1895 developed a relatively even distribution of land among peasant small-holdings (Ka 1995: 16). This system gave rise to a class of perpetual tenants. The Japanese colonial administration gave *ta-tsu* holders long-term bonds in exchange for their tenants, mollifying some who lost large holdings (Myers and Yamada 1984: 429). The resulting Taiwanese social structure was relatively flat: large farms were exceptional; for the most part the land was held in small parcels (Ka 1995: 148–9). Land reform in Taiwan did not fundamentally change Taiwanese social structure (Chu and Lin 2001: 106).

Prior to annexation, all land in Korea was officially the property of the crown, but it was controlled by the *yangban* (Lee 1963: 93) who collected rents from peasant tenants. To encourage *yangban* collaboration with the

new regime, the Japanese colonial administration granted exclusive land ownership rights to its members following a land survey intended to create a modern system of private land ownership (Kang 1994: 100). The *yangban* registered ownership claims over the common property of villages and claims by independent farmers to their own lands. As a result, a huge Korean tenant class, burdened by high rents and taxes, had its traditional hereditary rights to land replaced by short-term contracts (Lee 1963: 94). The Japanese government attempted to further entice *yangban* collaboration by offering eighty-four members titles and stipends. Only eight refused and the Japanese colonial officers pensioned off thousands of others (Henderson 1968: 77).

Even so, many of the *yangban* resented Japanese colonial rule. Their privilege had never rested on land ownership, but on access to high government and military offices. However, the Japanese government ended all statutory distinctions among Koreans (Lee 1963: 96), and reserved virtually all government offices for themselves.⁷ Since many Korean landlords who were unable to pay their taxes had their lands confiscated (Lee 1963: 94–5), Japanese land ownership increased fourfold between 1910 and 1923. When the emperor died in 1919, a large proportion of the mourners who came to Seoul to mourn his death – many of whom were arrested in the subsequent March First Movement – were former *yangbans* (Lee 1963: 96). Demonstrators complained about the loss of *yangban* privilege and property (Lee 1963: 96). Although the elimination of class distinctions was meant to appease the lower classes, it mostly succeeded in estranging the elites.

Ironically, the Japanese colonial authority managed to alienate both the elites and the peasants. The gifting of private land ownership to the *yangban* met with increasing resistance from the peasantry. They accused the landlords of collaborating with the alien ruler (Cumings 2005: 152). Peasant protest was so severe that the Japanese government enacted a radical land reform which established tenants' rights, giving long-term security to their leases. By raising the cost of labor, the land reform also led many Korean landowners to invest in industry rather than agriculture. The small Korean business class was nurtured by the Japanese colonial administration to encourage their collaboration. This small elite received financial support and direct subsidies for selected land reclamation, mining and industrial projects (McNamara 1989: 311). During the period of Japanese colonial rule major economic expansion was impossible without state-controlled credits or subsidies. Thus Korean entrepreneurs had very strong incentives to collaborate with Japanese state officials (McNamara 1989: 315).

These differences in the interaction of native elites with the alien ruler attest to the importance of supply factors in understanding varying resistance to Japanese alien rule. Taiwan was an agrarian economy characterised by small farms and a relatively weak native elite. At the onset of Japanese alien rule, landlords with the strongest Chinese loyalties and Taiwanese who stood to lose most from the occupation were allowed to escape to the mainland. This enabled the Japanese colonial administration to rid Taiwan of most of the

leaders of a potential nationalist opposition, and helped establish new elites who were dependent on the Japanese government and thus willing to collaborate.

In contrast, Korea was a much more polarised society with a strong and well-entrenched elite that had little opportunity to exit on its own terms. Its traditional stranglehold on Korean society was threatened by the Japanese occupation, and its class privilege was soon eliminated by egalitarian policies and by its removal from government offices. Only a very small segment of this elite collaborated with the Japanese alien ruler. As a consequence, Korea had an ample supply of leaders to mobilise a nationalist resistance movement against Japanese rule.

Since the grievances resulting from occupation ultimately motivate nationalist collective action, we next consider other factors affecting the demand for change in these two countries.

Demand factors: the effects of Japanese colonial rule on Taiwan and Korea

Economy

At the turn of the nineteenth century, both Taiwan and Korea were primarily agricultural societies. Taiwan opened several ports to foreign trade by the 1860s, but the harbors were in poor condition. Taiwan had no strong banking institutions, nor a reliable currency system. Poor sanitation and public health caused high rates of plague and disease.

In contrast, with a market economy on the rise, Korea had already begun to undertake economic growth decades before Japanese alien rule (McNamara 1986). The Korean infrastructure was much more developed than the Taiwanese with small manufacturing and mining sectors (Haggard, Kang and Moon 1997: 869). Last, disease and epidemics were less endemic than in Taiwan due to Korea's continental climate.

The Japanese colonial administration largely invested in agriculture in Taiwan and in mineral extraction and industrial development in Korea. Beyond this, the Japanese occupation brought important infrastructural investments in both territories. Yet the vividness of these investments was greater in Taiwan than Korea because of its much lower level of development and differing social structure at the outset of Japanese occupation.

Overall, the economies of both Taiwan and Korea grew under Japanese rule. The GDP increased at three per cent annually in Korea, and four per cent in Taiwan (Lieberman 1996: 103). Moreover, mortality was reduced by a better diet, increased availability of modern medical services, and a general improvement in public health.⁸ These aggregate indicators suggest that alien rule increased overall welfare levels in both countries, one of the key potential determinants of regime legitimation.

During the first decades of Japanese rule, the government sought to increase agricultural production in both colonies. The Japanese colonial

administration encouraged more specialisation and the adoption of improved seeds and fertilisers, leading to better techniques and higher productivity (Han-Yu and Myers 1963; Myers and Yamada 1984: 432). However, due to its more favorable sub-tropical climate, this effort was more actively promoted in Taiwan.

In Taiwan, both arable and irrigated land more than doubled. *Hsiao-tsu* holders compensated for their higher taxes by increasing land productivity by an impressive eighty-one per cent by 1938 (Ka 1995: 61), in cooperation with Japanese rulers. Agriculture was also more diversified in Taiwan. Korean farmers depended solely on rice as the main source of income and planted coarse grains and vegetables for subsistence (Ho 1984: 441).

In Korea, agriculture gradually fell behind construction, commerce, and services. The greatest growth of GDP was consistently in manufacturing and mining (Haggard, Kang and Moon 1997: 869). Whereas growth in Taiwan occurred without much change in the social structure (Ho 1975: 423), Korea witnessed some of the most dramatic social changes of any agrarian society undergoing an industrial revolution, incurring large-scale population shifts and high levels of dislocation and urbanisation (Cumings 2005: 175).

Korea's industrial development served mainly to expand the Japanese home market and to supply the government with the resources needed for expansion and war mobilisation. Some small firms benefited from cooperation with the Japanese colonial authorities, but overall Japan discouraged Korean-owned industries. The average size of Korean-owned factories decreased during Japanese rule (Haggard, Kang and Moon 1997: 871). Japanese entrepreneurs owned all the large financial and commercial firms, and, particularly in the private sector, the ranks of Korean white-collar workers in 1940 was an exceptionally low four per cent (Eckert 1996: 22–7). Japanese workers comprised about twenty per cent of the workforce in manufacturing employment. Most Koreans were clerks and lower-level functionaries (Haggard, Kang and Moon 1997: 873), though by the end of occupation Koreans consisted of thirty to thirty-six per cent of higher ranks (Eckert 1996: 25).

In sum, Japanese alien rule resulted in greater disruption of the Korean than the Taiwanese social structure, and the benefits of development, though substantial in both countries, were more visible in Taiwan. Natives owned a greater proportion of the productive forces in Taiwan than their counterparts in Korea, and Japanese colonial policies stripped Korean elites of much of their power.

Culture

Japanese cultural policy in both Taiwan and Korea was relentlessly assimilationist. To induce compliance with alien rule, the regime had the overweening ambition to replace Korean and Taiwanese identity with Japanese (Aziz 1955: 11). This goal was reflected in new directives in education, religion, and language.

The Japanese government sought to assimilate the Korean population by stressing their geographical proximity, linguistic similarities, and common Buddhist and Confucian roots (Kang 1994: 149, 152; Rhee 1997: 153–4). At the same time, it enacted harsh policies with the aim of eradicating all vestiges of Korean culture. New education policies were one cornerstone of this attempt (Lone and McCormack 1993: 65; Kang 1994: 150). The Educational Ordinance of 1911 established a unified schooling system throughout Korea designed to develop industrial, agricultural, and commercial skills (Chen 1968: 146). Koreans' education on the peninsula was limited to elementary, vocational, and technical schools (Kang 1994: 151–2). Less than one-third of school-age Koreans attended school (Lone and McCormack 1993: 66–7).⁹

Subjects of study, textbooks, and proper teaching procedures were controlled by the Governor General (Chen 1968: 147). Ethics courses designed to instill loyalty to the Japanese emperor were required. The use of textbooks printed before Japanese annexation was prohibited (Kang 1994: 151–2).

Education was regarded as critical for the assimilationist project in Taiwan as well (Tsurumi 1979: 617). Though Taiwanese students could study engineering, science, technology, and medicine, the subjects of law, politics, and the social sciences were forbidden for their allegedly disruptive potential (Copper 1996: 31; Morris Wu 2004: 53). As in Korea, many Taiwanese elites sent their children to Japan to be schooled (Phillips 2003: 21). The Taiwanese emerging literati class was strategically interacting with the Japanese rulers, collaborating with the regime, but also opening the space for expressing political grievances and demanding political concessions. In Korea, by contrast, throughout the entire colonial period 'to be educated was to be anti-Japanese' (Tsurumi 1984: 307).

Taiwanese education policy differed from Korean in two key respects: it was initially less centralised, and a far greater proportion of students were educated in Taiwan. First, whereas the Japanese colonial administration took central control over Korean education immediately after annexation, this did not occur in Taiwan until twenty-four years after annexation. As a result, the shift in Taiwan's education system was gradual rather than instantaneous, and the gradualism of this shift reduced the resistance to Japanese assimilation (Chen 1968: 146–8). Second, whereas only a small proportion of the Korean population received any education at all, the Japanese regime greatly expanded educational opportunity in Taiwan.¹⁰ The low level of student enrollment in Korean primary schooling was an obstacle to cultural assimilation.

Japanese colonial linguistic policies were closely wed to its educational policies. One of the Japanese government's colonial goals was the dissemination of the Japanese language in both Taiwan and Korea (Kang 1994: 151). Japanese became the official language of Korea (Lone and McCormack 1993: 66; Breen 1998: 105), and Korean became a second language in schools. The Japanese administration responded to the nationalist uprisings of 1919 by easing its policy of cultural repression: it allowed the use of the Korean language in magazines, newspapers, radio, and other media communication

(Robinson 1999). This policy shift had the unintended consequence of stimulating Korean nationalism (Robinson 1988: 4).

In the 1930s, restrictions against the use of the Korean language mounted heavily as Japan prepared for war. Korean newspapers were closed (Kim 2005: 137); the instruction of Korean – even as a second language – was prohibited in 1938 (Rhee 1997: 74). All classroom instruction was to take place in Japanese (Breen 1998: 114). Students received harsh punishment for speaking Korean in class (Breen 1998: 114), and it was expected that they would speak Japanese at home (Kim 2005: 137). While the Taiwanese might have encountered sporadic inhibitions against speaking their native language in public, Koreans were subjected to severe punishments, such as the imprisonment in 1942 of thirty-three leading members of the Korean Language Society (Chou 1996: 54).

By the 1930s, the use of Chinese in Taiwan in most publications and public fora was prohibited (Mendel 1970: 21; Jones 1999: 82). Yet, despite the similarity of language policy in the two countries, there was considerably more linguistic assimilation in Taiwan than Korea. Whereas more than fifty-seven per cent of Taiwanese knew Japanese by 1941, the corresponding figure for Korea was 17.6 per cent (Chen 1968: 173; Tse-Han, Myers and Wou 1991: 45).¹¹

Further, Koreans were forced to discard their ancestral names and adopt Japanese ones (Breen 1998: 105). Those who did not comply were fired, expelled from school, denied mail and train services, and given decreased rations (Kim 2005: 138; Rhee 1997: 74). Unlike in Korea, however, the shift to Japanese names in Taiwan was optional (Jones 1999: 82) – indeed, a permit was required to change names in Taiwan (Hicks 1994: 41). By 1942, only about ten per cent of the population had done so (Tse-Han, Myers and Wou 1991: 32); in Korea, where the policy was compulsory, eighty per cent of the population had adopted Japanese names (Kim 2005: 138).

At first, the Japanese colonial administration encountered few problems with religion in Korea. Because Buddhists had faced discrimination in Confucian Korea, Japanese colonial policies redressed this and thus encouraged the bulk of the Buddhist population to be amenable to alien rule (Lone and McCormack 1993: 54; Kang 1994: 156). Whereas Christian missionaries were initially supportive of the Japanese annexation of the peninsula, they soon came into conflict with Japanese policy (Kang 1994: 156–7). Religion was among the only forms of permissible social activity, and Christian churches took a strong leadership role in the March First Movement (Lone and McCormack 1993: 54; Kang 1994: 156–7). Christians provided most of the signatures to the Declaration of Independence, and also felt much of the brunt of Japanese colonial retaliation (Lone and McCormack 1993: 56).

The regime's introduction of Shintoism, which became the official state religion, created pervasive discontent. Shinto shrines were built throughout Korea's major cities as symbols of Japan's conquest and as a means of instilling reverence for Japanese alien rule (Rhee 1997: 63). Koreans were

forced to worship at Shinto shrines beginning in 1935 (Kang 1994: 158). In 1940, more than 2,000 Christians were imprisoned for refusing to worship at these shrines, while two hundred churches were closed (Kim 2005: 137).

In Taiwan, Chinese monks maintained strong relationships with the Japanese colonial regime until it enacted tougher assimilation policies in the 1930s. Since dissident groups, like the Taoists, began to use Chinese temples, shrines and meeting halls under the cover of Buddhism (Morris Wu 2004: 54), the Japanese colonial administration responded by announcing a campaign to raze and burn these sites throughout Taiwan (Jones 1999: 37, 62, 81–3). Students were forced to worship at newly constructed Shinto shrines, and Chinese families were asked to replace their Buddhist ancestral shrines with Shinto ones (Tse-Han, Myers and Wou 1991: 29). These measures, however, were enforced less stringently than in Korea. In Taipei, for example, most Chinese Buddhist temples were well connected with the local governments and escaped Japanese restructuring efforts (Jones 1999: 83, 87).

Finally, no analysis of the cultural consequences of alien rule in these countries is complete without mention of the still-volatile issue of comfort women. During the Second World War, between 100,000 and 200,000 women were conscripted to serve Japanese soldiers sexually on the front lines. Korean women apparently accounted for eighty to ninety per cent of all comfort women (Chung 1995: 16); some 150,000 Korean women were enlisted (Breen 1998: 113) as they were preferred by Japanese soldiers for their skin color (Oh 2001: 10). While the number of Taiwanese comfort women is in dispute (Hicks 1994: 241), there were significantly fewer than in Korea. As a result, there has been much less outrage over the treatment of comfort women in contemporary Taiwan than Korea (Hicks 1994: 239).

Despite the fact that Japanese colonial cultural policies were similar in Korea and Taiwan, they were imposed more centrally in Korea, in spite of some variation across localities and time periods (Kang 2001). Cultural policies in Taiwan were enforced locally, were less harsh than in Korea, and some – such as the prohibition of foot-binding and restriction of opium smoking – were even progressive (Morris Wu 2004: 54).

Governance

Whereas the Japanese government instituted a form of direct rule in Korea, its rule in Taiwan was more indirect. In general, indirect rule inhibits nationalism by reducing the demand for sovereignty (Hechter 2000; Sambanis 2006). Direct rule, however, fosters nationalism by antagonising local authorities. The most extreme form of direct rule is military rule. Korea had an autocratic military regime wherein supreme political authority was held by one person. In contrast, there was a fusion of military and civilian rule in Taiwan.

When Japan incorporated Korea into the empire in 1910, ultimate political authority was concentrated in the office of the Governor-General (Ku 1985: 10). Until 1919, only generals from the army and navy could be appointed to

it. Even though civilians were eligible to hold the office after 1919, none did. The Governor-General controlled the political bureaucracy and all military and naval forces; he had the power to issue executive ordinances that carried the same weight as laws from Japan. The Korean Governor-General was responsible only to the Emperor. Many procedures and laws, including commercial laws, civil procedures, and taxation laws, were developed directly by the Governor-General's office (Chen 1970: 132, 127–40). To conceal the extreme directness of Japanese rule, a Korean governing body, the Central Council, was created with an ostensibly consultative role. The Council's membership was selected by the Japanese colonial administration, and it was never consulted about matters of any significance (Brudnoy 1970: 166–7). In effect, therefore, the Governor-General of Korea had dictatorial control over the peninsula with few domestic checks on his power.

Taiwan was governed more indirectly. Like Korea, the Governor-General of Taiwan was empowered to implement imperial policy. However, his power was limited in several respects. The Governor-General of Taiwan was not solely accountable to the Emperor; there was considerable oversight from the government in Tokyo. The Governor-General was placed under the authority of the Japanese Ministry of Colonial Affairs and Home Ministry, whereas the Korean Governor-General's office was not. While the Governor-General of Taiwan had command of military and naval forces, he was forced to accept the direction of the Ministers of Army and Navy over defense mobilisation projects and certain administrative personnel decisions. When he used the colonial garrison to purposes of public order, he was required to issue a report to the Minister of Home Affairs and the Chiefs of Staff of the Army and Navy (Chen 1970: 127–35).

Following liberalisation in 1919, Japanese civilians were permitted to become Governors-General of occupied lands. This occurred in Taiwan – nine consecutive civilian governors held the post of Governor-General between the years 1919–1936 – but not in Korea (Lamley 2007: 221). Since the civilian Governor-Generals of Taiwan had no control over the military, they were more constrained than their Korean counterparts.

Local administration in Taiwan also differed from that of Korea in a crucial way. In Taiwan, control filtered down to the local level via the *pao-chia* system (Chen 1970: 142–4).¹² The *pao-chia* system permitted policing in the smallest of localities under a model that had been previously established by Qing administrators (Chen 1975: 393, 402). Faced with a series of local insurgencies, the Japanese colonial administration created this form of self-rule police in which all members of a *pao* or *chia* were fined if any anti-Japanese activity took place within the group (Chen 1970: 145). The *pao-chia* system gave the Taiwanese much greater involvement in their local affairs than their Korean counterparts. *Pao-chia* headmen were elected by Taiwanese heads of household for their respective units. The head of each *pao* and *chia* assisted the police in census-taking, watching population movements, preparing for natural disasters, and preventing crime. Though the Japanese

colonial regime exercised authority over the system (Chen 1975: 396), many headmen had incentives to collaborate with the Japanese officials – including educational benefits, business opportunities, and appointments to government posts (Chen 1975: 394, 397, 399–400).

In Korea, the Japanese government instituted a system of strict social control based on extensive Japanese policing, rather than an analog of the *pao-chia* system. The Japanese police were an overwhelming presence (more than nine policemen for every 10,000 people), and it employed lengthy detention, physical abuse and torture (Lee 1999: 37).

Japanese alien rule in Korea was much more direct and militaristic than in Taiwan, leaving little room for native elites to participate in governance. The demand for change was weaker in Taiwan due, at least in part, to the legitimization efforts of native elites.

Conclusion

This article began by outlining three propositions about resistance to alien rule. How do these fare in light of the Taiwan/Korea comparison?

- *Resistance should be greater in the initial period of occupation.* This is true for both Taiwan and Korea. The Chinese elite controlling Taiwan waged a short-lived war against Japanese forces before finally ceding the island. Following their exodus, the Japanese colonial administration struggled to put down unorganised local insurgencies for the first fifteen years of rule. The Korean elite, likewise, organised armed resistance against the Japanese regime for several years before the island was officially annexed. In both cases, elites organised rebellion against an encroaching alien ruler in order to protect their status and privilege within their respective societies.
- *The greater the opportunities afforded to native elites, the weaker the resistance to alien rule.* This is also confirmed in the comparison. Collaboration was more likely when native leaders were given prominent roles in the new regime. When the Japanese government took over Taiwan, most of the traditional Confucian elites fled to the mainland. On the one hand, this stripped any subsequent Taiwanese resistance movement of a supply of potential leaders. On the other, it elevated a group of Taiwanese to elite status, making them dependent on – and loyal to – the alien regime. These new elites had little to lose from the end of Qing rule, and thus their lack of solidarity to the old regime granted them attractive opportunities under Japanese alien rule. No such opportunity existed for the traditional Korean governing elites, who spoke a unique language and had operated in a unique culture. They largely remained in Korea while the Japanese colonial administrators took over their previously privileged roles as government office-holders, ended class distinctions, and acquired huge tracts of Korean land. Together with elements of

the large landowning class, which suffered in the Japanese colonial government's imposed land reform, these thwarted Korean elites played a key role in the development of anti-Japanese nationalism.

- *The less fair and effective the regime, the lower the legitimacy and greater the resistance to alien rule.* Here the picture is more complex. This proposition may be divided into two parts. Consider first the provision of economic growth – a key indicator of effective governance. Japanese rule spurred economic development in both Taiwan and Korea. In Taiwan, Japanese investment led to much greater output of rice, and created a modern sugar industry. The effects of alien rule in Korea were in some respects even more dramatic. By the 1930s, the Japanese colonial administration had ended centuries of exploitative relations between landlords and tenants in the Korean countryside. This helped to foster the rapid industrialisation of the peninsula. If Japanese rule was relatively effective in both countries, but resistance in Korea was much greater, then effectiveness evidently is an insufficient determinant of legitimacy in this comparison.

A key problem with the proposition linking effectiveness with legitimacy is that assessments of welfare are deeply subjective. This is not to say that welfare assessments are mere social constructions that have no determinate causes, nor that we cannot make causal inferences about them. Our perceptions hinge, in part, on our experiences. At the onset of Japanese alien rule, Korea was considerably more developed than Taiwan. For an observer to have noticed perceptible improvements in welfare, the Japanese colonial regime would have had to produce far more public goods in Korea than in Taiwan (McNamara 1986). For this reason, the Japanese colonial contribution to the economic development of Taiwan was more dramatic, more vivid, than in Korea.

Now to turn to the fairness of rule. Here the differences between Korea and Taiwan are striking, and they are consistent with theoretical expectations. The practices that constitute what the Koreans have termed cultural genocide – to say nothing about the treatment of Korean comfort women – were a great deal less fair than those meted out to the Taiwanese. Hence, in this comparison fairness turns out to trump effectiveness as a determinant of legitimacy and lower resistance to alien rule (Tyler 2006).¹³

Fairness matters most to the intermediaries between aliens and natives – that is, to the collaborators with the alien regime – because due to their resources and traditional standing they are likely to have the greatest influence in the native population. As such, they can either collaborate with the regime or rebel against it. As we have seen, here too there is an important difference between Korea and Taiwan.

The effects of alien rule on native populations are far from universal. Whereas often these effects are malign, in other cases they are beneficent (Hechter in press a, in press b). The history of Japanese colonial rule in

Taiwan and Korea reveals both kinds of effects. The legitimacy of alien rule hinges on the kinds of policies that alien rulers impose on native populations. Although alien rule spurred infrastructural development and economic growth in both countries, it was more destructive of Korean institutions and culture than of Taiwanese. Japanese colonial policies targeting traditional Korean elites helped provide the conditions responsible for the growth of nationalism and resistance to alien rule. Combined with the exodus of many traditional elites, the more liberal policies enacted by the Japanese colonial administration yielded greater acceptance of alien rule in Taiwan.

Notes

1 The use of the term 'demand' is key in the above statement. In addition to providing universally-valued public goods like defense and sanitation, states provide public goods, like education in a specific language, that may not be universally valued by all groups in a culturally heterogeneous society (Laitin 1992).

2 Note, however, that this relationship may be non-monotonic, depending on the existing social structure of native society. In countries (like Korea) with an educated and politically active elite, the lack of opportunities under alien rule is likely to spur resistance. In underdeveloped countries having no such elites (such as British and French colonies in Africa, as well as Taiwan), the openness of the system to native elites is likely to be decisive. The Japanese government sponsored native elites to a much greater degree than the British and French.

3 Measuring the resistance to alien rule is no mean task. A wide range of resistance activities varies from exit, the establishment of clandestine newspapers and radio stations, to full-fledged insurgency (Michel 1972; Scott 1990). Systematic data on this range of activities simply does not exist for Korea and Taiwan. Hence this article gauges levels of resistance from reports of actual contentious events.

4 Indeed, Chen (1968) argues that the legacy of Korean statehood – and the absence of statehood in Taiwan – is the fundamental cause of these different reactions to Japanese rule.

5 Tse (2000: 157) suggests that when China ceded Taiwan to Japan through the Treaty of Shimonoseki, this spurred the creation of a sense of national identity.

6 Some of the native elites that fled to China later returned and helped establish the *Kuomintang* regime in Taiwan (Cheng 2001: 21).

7 The number of Japanese in the peninsula rose rapidly, reaching 708,448 in 1940. In 1937, 41.4 per cent of the Japanese population in Korea was in government service; the corresponding percentage for Koreans was 2.9 (Henderson 1968: 75).

8 Taiwanese death rates decreased from thirty-three per thousand in 1906 to nineteen per thousand in the 1935–40 period, and Korean death rates also declined from thirty-five per thousand to twenty-three per thousand in the 1935–40 period. It should be noted that caloric consumption decreased in the late 1930s (Ho 1984: 352, 398).

9 Elites, however, often sent their children to study in Japan (Lone and McCormack 1993: 68).

10 By 1943, eighty-one per cent of males and sixty-one per cent of females were enrolled in primary school in Taiwan (Phillips 2003: 21). Korean school enrollment reached only 33.8 per cent in 1940, and around 50–60 per cent by 1945 (Park 1999: 147).

11 The Japanese authorities may have had differing standards for evaluating Japanese linguistic assimilation. Wan-Yao Chou still concludes that the percentage of Japanese speakers in the two colonies varied greatly (Chou 1996: 52–3).

12 Ten households made up one *chia* (*ko*), and ten *chia* made up one *pao* (*ho*). The head of each *chia* and *pao* was chosen from among the village elders, and was accountable for each *pao-chia* (Han-Yu and Myers 1963: 439).

13 Difficult as it may be, the effects of legitimacy must be disentangled from those of repression since both mechanisms could be responsible for any observed lack of resistance. In Taiwan and Korea, however, the Japanese adopted similarly repressive policies limiting civil liberties and substituting Japanese newspapers for native ones (Ku 1985: 11; Copper 1996: 30). These policies were relaxed in both countries during the 1920s, and reinstated a decade later (Lee 1963: 260–3; Brudnoy 1970: 173–4; Kerr 1974: 125; Lamley 2007: 235–9). Since repressive measures followed the same course in these lands, at least some of the variation in resistance is likely due to the differential legitimacy of the alien ruler in Taiwan and Korea.

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