MODERNIZATION OR CULTURAL IMPERIALISM: 
A CRITICAL READING OF TAIWAN’S NATIONAL SCHOLARSHIP PROGRAM FOR 
OVERSEAS STUDY

BY

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DISERTATION

Submitted in partial fulfillment of the requirements
for the degree of Doctor Of Philosophy in Educational Policy Studies
in the Graduate College of the
University of Illinois at Urbana-Champaign, 2011

Urbana, Illinois

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Abstract

This research critically analyzes Taiwan’s long-standing National Scholarship Program for Overseas Study. It focuses on the program’s development between 1955 and 2000. The National Scholarship Program can be seen as Taiwan’s governmental pursuit of strategic modernization for national and social development. Strategic modernization does not necessarily imply a linear, progressive and teleological modernity; but should be viewed as an adjustable, flexible, and sustainable modernization that constantly transforms and assists a nation, like Taiwan, to adapt itself within its constrained and changing post-colonial condition.

This view of strategic modernization is based upon an interrogation of the discourses surrounding the scholarship program, while using post-colonial theories as a referential framework. Furthermore this research included an ethnographic analysis of discourse to investigate the program from two perspectives: one was the researcher’s critical discourse analysis of historical texts and the other derives from the narratives provided by program stakeholders including scholarship fellows, a policy maker and a program conductor. The juxtaposition of these two discursive perspectives revealed different facets of the program. In terms of policy discourse, the discursive shifts of the program demonstrated productivity and transformability in their emergence, continued development and integration of various broader political, economic and cultural structures. Ethnographic interviews, in spite of the fact that the emergent themes of the interviewees were not directly associated with the grand policy discourse of modernization for national and social development, revealed a shared sense of honor derived from their being national scholarship fellows; and seemed to drive their contributions to the various national agendas over different eras. Additionally, their different experiences of studying abroad in respective eras revealed the zeitgeists of their eras in varying ways. The discourse
shifts of making contributions to Taiwan – serves as an example of nationalisms. Fellows in the 1960s and 1970s were required to return to Taiwan and oftentimes were appointed as high-ranking governmental officials on national projects of an anti-communist nature, because of their advanced education and hybrid cultural experiences. Meanwhile, because of the changing discourse of nationalism, fellows and program conductors in the 1990s were convinced that staying overseas could also make significant contribution to Taiwan’s development because fellows’ professional development and their connections within “advanced” countries can be seen as an invisible extensive power of Taiwan.

In brief, when the program resumed in Taiwan, the discursive shifts can be understood as having four stages: Inception, Emerging, Expansion, and Transformation. Under the overarching grand discourse of modernization for national and social development, there were individual shifting discourses within the four stages of program development. On one hand, various structural conditions and contingent incidents, such as the Cold War and its ramifications, produced discourses that drove and perpetuated the program. On the other hand, scholarship became a means for Taiwan to adopt herself to her continuously changing world condition – a post-colonial condition which produced a complex, ever-changing set of interrelationships between Taiwan, China, and the United States.
To my post-colonial contemporaries who are devoted to building up an inclusive strategic community through which we could together couple with and transcend various challenges provoked by various kinds of politic-economic powers and cultural discourses.
Acknowledgments

My deepest gratitude must be given to my parents, Mr. Chen Jen-chyuan and Mrs. Chang Tsui-chin, who have supported me with their unconditional love. Coming from a rural area in southern Taiwan where quality public education was extremely scarce, my parents’ great belief in education drove them to overcome considerable difficulties, to move our family nearly ten times, until we finally settled down in Taipei, where better public education was more accessible. Neither had personal knowledge of university education, not to mention doing doctoral work in America; Nevertheless their great belief in love and hope for the power of education served as the foundation for my pursuit of advanced study in a foreign world beyond their living experience and imagination.

My special appreciation goes to my fiancé, Chyi-jang, who has not only accepted our long-distance relationship throughout these years but has been my best friend. Without the unreserved support of my parents and my fiancé, by no means could I have come this far.

My committee members, Dr Jennifer Greene, Dr Michael Peters, Dr Wanda Pillow and my advisor Dr. Cameron McCarthy were a dream committee for my doctoral research in every respect, e.g., their research specialties, culture, gender and ethnicities. Being prominent scholars in different fields, their ways of critically engaging knowledge and encouraging their students to reflect critically on educational issues inspired my professional development throughout my graduate program. In brief, you have to work with them to understand what I mean when I say they are “too cool” to describe.

My dear American Grandfather, Dr Terry Denny is the one who hammered on me in his witty and intellectual way and made Champaign-Urbana a second home for me. My undying gratitude goes to Dr Robert E. Stake, with whom I have been blessed to work. Conversations
with him continually shed light on my professional work and personal growth. Anyone who carefully reads this dissertation will not be surprised to find his influence therein.

I must thank my mentors in Taiwan: Dr Yang Kuo-shih and Dr Chen Shue-yun, whose professional behavior continued to remind me of my social and intellectual responsibility in the intellectual academy. Their influence doubtlessly constituted a crucial part of my research. Finally, my dear friends in Taiwan and cohorts in the US who have cheered me up and onward, you are the ones I need not name. Yes. I am referring to you who always “hang out with me”, exchange your thoughts and words with me, or just smile me back at me whenever I feel frustrated.

There remains a great number to whom I would like to express my appreciation. Since you are too many to name and thank individually here, I shall borrow the words of a Chinese writer, Chen Chih-fan (陳之藩) who wrote: “So I will simply thank God”, who makes my life intersect with such wonderful teachers and friends.
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Chapter 1

Introduction

Background

Now, if a Taiwanese scholar wants to be good, s/he must simultaneously know well the United States, China, and Taiwan. Previously, one just needed to know Western society and theories good enough to become a good scholar. Now in the era of globalization, scholars in Taiwan must know different contexts. It is a big challenge for Taiwanese scholars, to be international… (Phone interview with Professor C., April 19th, 2009).

This quote is from an interview with a scholar supported by Taiwan’s Government Sponsored Scholarship Program for Overseas Study (公費留學) studying her Masters degree at a top university in the west coast of the US in 1980. At first glance, the quote merely mirrors a general challenge facing contemporary Taiwanese scholars. But such a flat and one-dimensional appraisal does not tell enough of the story. A critical reading of the quote from multiple perspectives of temporality, geography, and power relationship brings in complex tensions embedded in languages used and their inherent values. For instance, the quote indicates that while in the past to be “good scholar” meant to familiarize oneself with Western theories, nowadays “good” means to be “international” which implies the significance of acquaintance with Taiwanese, Chinese, and Western contexts. At a fundamental level, one sees the fluidity of power of a discourse in the way of how the definition of “good scholar” has changed and what has been left unchanged. The above discussion provides an initial sense of what this research is concerned with. I will extend the discussion about interviewees’ narratives in the following chapters.

Within the context of globalization, scholarships for overseas study are extensively offered by a wide range of governmental, non-governmental, and non-profit organizations to facilitate study and conduct research abroad for various purposes. Taiwan’s Government
Sponsored Scholarship Program for Overseas Study (公費留學) provides financial support for the study of “advanced technology as well as social sciences” mainly in Western countries. It required students to return home to contribute their acquired knowledge and skills toward achieving the national agenda of modernization and sustainable development in the early Chinese republican government and Taiwan.

From its formal institution in 1909 during the Tsing Imperial Dynasty, the program underwent various changes during different political phases of the country including the newly established Chinese republican government in 1911, two world wars, three civil wars between the Communist Party of China (CPC) and the republican government led by the Chinese Nationalist Party (Kuomintang, KMT) between 1920-1949, as well as the establishment of the KMT-led government-in-exile in Taiwan in 1949. Nevertheless, the critical role of the scholarship program in post higher education in Taiwan remains unpacked, since providing native elites with Western education has been and is considered to be the best means of enhancing Taiwan’s human resource capability. In addition to government documents and policy papers articulating the contribution of this scholarship program to modernize China and Taiwan (e.g. MOE, 2008a), considerable scholarly research, based on different social theories, re-confirmed the critical role of the scholarship program in the modernization of China and Taiwan (Lin, 1976; Wang, 1980, 1992a, 1992b). Others have recommended strategies for sending more Taiwan’s elites to overseas studies (Jseng, 1997; Dai, 2005).

In 2003, controversial issues within the scholarship program, such as credibility and validity of using national central exam to select scholarship grantees¹, prompted the Ministry of Education to reform the selection process. Some other possible factors resulting in the reform included the practical challenges of ensuring grantees

¹ From researcher’s personal experience of working in the Ministry of Education, some other possible factors resulting in the reform included the practical challenges of ensuring grantees
Education (MOE, 2008b; Taipei Public Library, 2010), started a second type of scholarship program for overseas study (Liou Xue Jiang Xue Jin; 留學獎學金), one that selects applicants by evaluating their study plans/research proposals, CVs, and the reputation of schools to which applicants are admitted or for which students are applying (MOE, 2004, 2006, 2007a & 2008c). This second type of scholarship not only relaxes the term of returning to Taiwan to serve, but also created a larger number of scholarship recipients by reducing amount of scholarship to individual grantees\(^2\). Moreover, the MOE started a Loan Program for Studying Abroad\(^3\) (Liou Xue Dai Quan; 留學貸款) that provides limited loan for low-income Taiwanese students admitted by universities abroad (MOE, 2004 & 2007b). To a large extent, all three different scholarships and loan programs reflect shifts driven by different discourses concerning overseas education for Taiwan in various historical contexts.

**Research Purpose**

The purpose of this research is to provide a perspective for understanding this scholarship program by critically reviewing discourses of the scholarship program between 1955 and 2000. As the majority of existing literatures on the scholarship program or on Taiwan’s policy of returning to Taiwan to serve the country as one of the scholarship terms and condition, as well as the failure of having those returned grantees assume positions that matched their fields of study.

\(^2\) While the first type of scholarship program funds full tuition and living stipends for three years, the second type of scholarship program provides no more than US$ 13,000 tuition subsidence and US$ 12,000 as living stipends for two years.

\(^3\) The translation is adopted from the website of MOE.

studying abroad primarily focuses on the contribution of the program to the modernization in China and Taiwan and thus draw attention to measurements and enhancements of the efficiency and impact of the program, this research is devoted to unpacking the complexity of the educational program from multiple perspectives, such as international socio-economic structures, political ideologies, cultural discourses in the terrain of education and the dynamics of these various sources of power intersecting and contesting the scholarship program. A preliminary scrutiny of this program revealed complex relationships between the Scholarship Program, the contemporary modernization history in China and in Taiwan, and scholarship grantees’ influences on the process of modernization.

An analysis of the scholarship program between 1955 and 2000 reveals a temporal significance from at least three perspectives. First, 1955 is the first time the scholarship program is resumed in Taiwan since the Chinese Nationalist Party of the Chiang Kai-shek regime came to Taiwan in 1949. In a strict sense the scholarship was initiated in 1960 when an official, public budget is declared (Taipei Public Library, 2010; MOE, 2008b). This research will provide a succinct portrait of the program coming into being in late 19th century and its official institution in 1907 in China. This historical subtext from late 19th century to 1955 illustrates the entangled relationship between imperialism/colonialism, modernization, the emergence of modern nation state— Republican China⁴, and the role of the Scholarship Program in relation to educational policy.

⁴ Here the Republican Chinese government is generally referred to the Chinese government established by Nationalist Chinese Party led by Sun Yat-sen. The government lasted from 1911 to 1949. Although the Nationalist Chinese Party (KMT) officially led the government, the Communist Party of China, supported by the Soviet Union, was constantly active in contesting
Second, analysis of the program between 1955 and 2000 will portray how during the Cold War era Taiwan’s educational policy was infused with blended discourses of political ideologies and social theories, such as Modernization or Development Theory. As Chen pointedly articulates (2010, p. 4), the present decolonization project (especially in Taiwan’s case) compels one “to confront and explore the legacies and ongoing tensions of the cold war . . . these three movements – decolonization, deimperialization, and de-cold war – have to proceed in concert, precisely because colonization, imperialization, and the cold war have become one and the same historical process” . Although “decolonization” is not the primary interest of this research, I would suggest that the understanding of the program that is situated in the contemporary post-colonial condition in East Asian context would be partial without addressing international disposition during the Cold War era. In particular, an analysis of the program during this time period reveals the dynamic complexity of the scholarship program. In other words, my research not only seeks to reveal the non-neutrality and assumed political independence of educational policy but also provides examples of how various models of imperialism and colonialism have comprised a dynamic multi-lateral relationships between the US, China, and Taiwan.

Third, analysis of this time span further enables one to see discursive shifts in the program that reflects a larger historical context. These discursive shifts, on the one hand, are shaped by broader contextual structures or contingent historical incidents; on the other hand, the discourses per se also play a crucial role of perpetuating the structures or initiating new

over the power of leading the government. The two parties conceived of two different routes of pursuing modernization in China.
structures. However, the perpetuation of the political structures cannot be understood if viewed as a mindless, mechanical, bureaucratic function. Rather, this research provides another example in the realm of educational policy that reconfirms what A. Bedhad argues is the adaptable and transformable Orientalism. Bedhad asserts that Orientalism could incorporate differing and heterogeneous ideological elements, thus making possible the production of a whole series of hegemonic discursive practices in various epistemological domains (Behdad, 1994, p. viii).

**Principal Research Issues**

The core research concern is with discourses that include two different dimensions: discourses within and about the program itself; and the perception of scholarship grantees toward the discourses based on their experiences of overseas studies. For the first dimension, this research is devoted to understanding what are the major discourses that constitute the scholarship program? How and why did the discourses, such as modernity/modernization and national development, become primary rationale driving the institutionalization and perpetuation of the scholarship program? For instance, why and how did the needs for “modernization”, for “national and social development”, or for “internationalization” become needs of the Chinese and later on the Taiwanese society? What are the historical contexts, including international politic-economic and socio-cultural structure that produced or perpetuated such a scholarship program?

For the second dimension, this research asks: What were scholarship recipients’ experiences of studying abroad? How did they perceive the scholarship program, in particular the discourses? What was the relationship between the structure, discourse, and the scholarship grantees? And how did they see this relation when reflecting back upon their experiences as scholarship recipients?
Research Questions

The above principal research issues are embodied in following research questions:

1. What discourse governs the scholarship program?

2. What were the contingent historical condition/events that enabled the emergence of a discourse that created, drove and sustained the scholarship program? How does the discourse derive and obtain its legitimacy and applicability? How was the discourse transformed through different historical eras and perpetuated by its international socio-political structure?

3. What are the positions of the questioning subjects that enable them to undertake the creating and shaping of the discourse? Are their experiences subscribed by those discourses?

At first glance, these questions may seem to be concerned merely with discourses. Nevertheless, as the research unfolded, one saw that the ethnography of discourse of the program reflected a tangled discursive bundle of modernization, subjectivity, nationalism, and production of knowledge in relation to power. Moreover, this bundle was inevitably bonded with Taiwan’s international position.

This Research and the Researcher as Kaleidoscope

Personal anxieties can be seen as a rich source for many researchers to develop their scholarship. For instance, post-colonial critics like Frantz Fanon (1952), Edward Said (2008), and Stuart Hall (1996a), all colonized subjects, noted their individual internal tensions in reflecting upon their own subjectivities. It is not my claim that the psychological tension experienced by Taiwan’s scholarship grantees is exactly the same as that of these post-colonial
critics. Nevertheless, it might be fair to say that personal tensions have indeed driven me to examine the issues concerned in this research.

From 2002-03, as a civil servant in the MOE, I worked in a division that was responsible for this national scholarship program and promoting Taiwanese students for overseas studies. While in that position, problems that concerned me most of the time dealt with scholarship grantees’ challenges and complaints about the terms and conditions of the scholarship program; e.g., offering a persuasive rationale for the requirement that they return to Taiwan to serve the country without the government’s provision of any position. Additionally, a few grantees would sue the MOE in the administrative court for imposing the terms and conditions based on a loose form of memorandum booklet. And occasionally my job responsibility required me to file lawsuits against grantees when they violated the terms and conditions of a memorandum for scholarship fellows. My nearly seven years of working in several positions at the MOE as well as at the overseas office of the MOE in the United States not only further familiarized me with the program and policy for cultural and educational exchanges, but also sensitized me to the policy efforts to connect Taiwan with the international society. It must be said that educational policy and program usually need to comply with overarching national policies that often change in accordance with new political parties; or with leaders who oftentimes have their individual particular philosophies, ideologies, or cultural identity. As a consequence, at the level of practice, educational programs and policy oftentimes are constantly debated and adjusted to the forces of political and economic factors.

After experiencing several position shifts, in order to fulfill my own “dream of pursuing advanced study abroad”, I quit my job and applied for the national Loan for Studying Abroad to enroll in the doctoral program at UIUC in 2007. A year after entering the doctoral program, I
applied for a newly developed fellowship program for overseas studies of Taiwan and became a grantee. In Chapter 5 I will discuss in detail how the newly developed fellowship came into being, especially its driving discourse. For the present I shall briefly say that the MOE adopted part of its budget for supporting the conventional national scholarship program for overseas study to establish a new fellowship that selected fellows based on evaluating applicants’ research proposals, study plans, the prestige of their current schools of their studies, and their overall professional experiences. The terms and conditions of this new fellowship program are not as strict as those of the conventional national scholarship for overseas study.

Based on my involvement with the MOE programs and my current status as a fellow supported by the new fellowship studying in the US, I shall now use a kaleidoscopic metaphor to describe the relationship of my position as a researcher to my interpretation of the scholarship program. Unlike a telescopic or microscopic perspective that magnifies real and fixed objects/truths out there, this research produces several different images of the scholarship program kaleidoscopically by rotating its mirrors. A kaleidoscope consists of several elements: at least three mirrors configured as a tube, colorful pieces of paper or particles in the end of the tube, and lights from various angles while the kaleidoscope tube is rotated.

Different types of data serve as colorful particles in the bottom of the tube: primarily texts from formal government papers, informal documentation such as newspaper reports and other research that tried to theorize the scholarship and its rationales, and interviewees’ narratives. Configured within it are at least three different methodological and theoretical mirrors: textual oriented discourse analysis, ethnographic representation of interview data, as well as post-colonial theories. Moreover, my experiences of previous work in the MOE and
current overseas study, works as a mixed light to tint the complexity of the image – as a momentary one resulting from lights taken from my particular perspective.

On the first level, the different types of documents already contained various features of the most essential researched components – like colorful pieces of papers or particles in the kaleidoscope. Texts and narratives that were regarded as texts that could be read with different emphases and interpretations of different facets. The more different pieces I include, the more complex the projected image becomes.

Since various methods *per se* have their individual primary interests, strengths and weaknesses, different methods resulting in the collection of data with their own respective features. Moreover, paradigms further complicated the employment of different methods. In this research, two paradigms underlay the two mixed methods that were employed. Whereas a post-structural paradigm supports textual oriented discourse analysis, interpretivism substantiates the ethnographic interview. Accordingly, the textual oriented discourse analysis provides a mirror that best reflects discourses, the structures producing them, and dynamic power between the two embedded in government papers, newspaper reports, and theories that advocate/devaluate a specific view of Modernization and Development. This critical analytical framework is in contrast to an ethnographic reading of documents that mainly looks for coherence and convergence between statements and utterance. Rather, it mirrors how discourses are connected with other utterances as a whole, formed by other diverse powers that dispersed in cultural and educational domains. From this view, structural relationships, political, economic, and cultural discursive power could be most clearly projected from the methodological mirror of discourse analysis and constitutes a chromatic part of the image.
The second mirror in this research is another method: ethnographic interview. From an ethnographic view this research emphasizes policy makers’ and scholarship recipients’ “real” experiences, rendering another perspective in our understanding of the program. By presenting narratives of real lived experience, this research meant to honor their perspectives. It did not intend to judge these narratives as reflections of “false consciousness”, or to claim that they were colored by “ideologies”, since both “false consciousness” and “ideologies” as such imply value judgment as opposed to coming to understand the discourse surrounding the program. In this respect, the post-structural concept of discourse seems to provide a more flexible and inclusive framework that could better reflect the dynamic and productive power relations between different discourses. Accordingly, one could say that participants’ experiences of study abroad could be influenced by particular “discourses” under various social milieus which occurred at the time they went to study overseas; rather than saying that their experiences were tinted by false consciousness or ideologies that could be judgmental. This ethnographic mirror reveals the practical agency of fellows, program conductor and policy makers as well. In brief, in this view the “subjects’ voices” are concerned, equally important as researcher’s critical discourse analysis.

Finally, post-colonial theories provide the third critical mirror that reflects how the discourse of Modernization, supported by different social theories underpinned by various philosophical traditions, could possibly be complicit with imperialism and colonialism. Similar to textual oriented discourse analysis, one major issue concerns with post-colonial theories is discourse, power, and structure, while post-colonial theories further particularly illuminate these issues in the relationship between the colonial and the colonized. This distinctive emphasis provides the mirror for discussing Taiwan’s multiple contexts deeply involved in a post-colonial
condition, that not only in the temporary sense of post-Japanese era, but also in the sense of cultural hybridity as legacy of Japanese colonization, Chinese diaspora led by ideological struggles, and American foreign policy in east Asia.

My metaphoric use of the kaleidoscope constitutes a recognition of the crucial and potentially “biasing” influence of my experience on the narration and interpretation of this research on the scholarship program. The mixed light from a specific direction very likely influenced my interpretive stance from other directions. Furthermore, my own mixed experiences both enable and compel me to integrate voices from various perspectives, rather than to either judging or attempt to polarize them. From a macro perspective of national policies and programs, my experiences of being a program conductor and an officer in a diplomatic system, I was aware of and influenced by the Taiwan government’s efforts both for the benefit of the students and the strategic development of national policy. As a fellow of the newly developed fellowship program, my personal goal and financial need for study abroad largely comes first although I don’t necessarily disagree with the broader concerns of the national government. In brief, in addition to reflect the mixed-methods design and the complexity of the scholarship program as a kind of projected colorful image, my metaphor of kaleidoscope is also to reveal my personal perspective, as a kind of light projecting on the mirrors, that is so crucial in qualitative research.

Additionally, the analogy of kaleidoscope is also useful to discuss my experience of being a historical subject situated in a post-colonial condition beyond my being a post-colonial Taiwanese: namely, being a post-colonial Taiwanese in an American academy. This can be best described by starting with a personal anecdote. During my early stage of searching for possible dissertation projects, I asked a Taiwanese professor who studied in the US for tips of writing an
interesting dissertation project that however would not necessarily restrict my professional future. The professor suggested that I select a research US topic that would not require the financial resources required by conducting research in Taiwan. And more likely I could get sponsorship in the US too. Regarding this suggestion, I was concerned about potential challenges of being an outsider conducting qualitative research requiring strong cultural and social sensitivity and knowledge, and eventually of making new contributions to the field. In this regard it was suggested that I followed whatever mainstream perspectives were being argued in the field, so that I could finish the dissertation project sooner. Additionally, I could avoid problems of representing the whole complexity interwoven by all various historical, political, economic, and socio-cultural threads of a non-American context needed for understanding a qualitative research, since at least American socio-cultural contexts are shared and better known among Americans.

As it will soon be seen, I did not follow the suggestion, and chose the current one when I was fortunate to receive the newly developed fellowship through an early proposal of this dissertation. By telling this personal anecdote, I want to reveal the kind of political and ethical dilemmas that occur for international students in their choices of research topics. This is a particularly poignant issue for students like I who come from a country that was once colonized or imperialized. In other words, as a post-colonial subject like me, one major question emerging in conducting research is how I couple with all of these notions and assertions involved in theorizing “my post-colonial subjectivity” and “needs for me to get modernized through a scholarship program”. Interestingly, it is also my post-colonial subjective stance that compels me to be more sensitive and speak to all these various kinds of notions and assertions theorizing “me”. The point I am trying to make here is what Hall termed “a position of enunciation”
Hall used this term to discuss cultural identity, which I think is also crucial when discussing researchers’ subjectivity in conducting research. Namely, social theories and assertions are always formed and enunciated from a particular position within a specific socio-cultural context. Acknowledging this enunciating position is critical, since this further “provincializes” (Chakrabarty, 2007) many social theories and reveals how these particulars have become universal.

Being mindful of this issue, as a post-colonial subject I am informed and guided by my experiences in my conduct of research. I use Taiwan’s complex case to address different “Modernities” –Liberal Modernity, (neo-)Marxist Modernity, and even Post-colonial discourse to criticize these grand Modernities that have somehow gradually become monolithic and have failed to distinguish qualitatively different post-colonialities. Their nuances cannot be revealed by telescoping viewing from afar. Neither can they be understood by viewing merely with microscopic magnification. Rather, I have used the metaphor of the kaleidoscope to reveal the complex colorful, interconnected but temporary images that always been revealed to change with the rotation of points of view, methods, data and the researchers’ personal experiences.

**Theoretical Framework**

In this research, my review of the literature focuses on the research of the scholarship program in relation to international educational policy of Taiwan, Development/Modernization Theory versus Neo-colonial/Dependence Theories, and Post-colonial theory. My review led to a preliminary conclusion that post-colonial theory provides an adequate theoretical framework that meets the primary interest of this research. Nevertheless, post-colonial criticisms oftentimes over-emphasizes the discourse of West/Rest, and cannot suffice to understand the dynamic
interactions between the US, China, and Taiwan. In this relationship, Taiwan has been a crucial pawn whenever super powers China and the US have interacted politically.

A review of existing literature on the scholarship program yields two dominant themes. First, much research is based on the assumption of China’s and Taiwan’s needs for modernization. It has examined the influence and contributions of the scholarship on Chinese and Taiwanese modernization (Lin, 1976; Wang, 1980, 1992a, 1992b). The assumption of China’s and Taiwan’s needs for modernization and development has been underpinned by theories such as Development Theory or Modernization Theory. Development/Modernization Theory is a set of propositions that adopt a linear and evolutionary model of development to account for social conditions of “developing” and “underdeveloped countries” (e.g. Rostow, 1955 & 1960; Lerner, 1958). One of the main features of the theory is that there is a manual for underdeveloped or developing countries to become developed; e.g., developed countries could provide aids in various forms, including education, to assist underdeveloped countries to become “modernized”. This approach has been challenged by other scholars who argue that neo-colonial theory enables the developed countries (mainly West European countries and the United States) to keep control over the previously colonized countries, all in the name of help (Nersesovich, 1972). A political-economist suggests that American utilization of education is yet another manifestation of cultural imperialism (Carnoy, 1974).

While neo-colonial advocates insist on the crucial role of improving the political economy, post-colonial theorists extend their analysis to cultural terrains to unmask an entirely different scene of power relations between the colonial and the colonized, one that had been long covered with “scientific and knowledge claims”. Post-colonial theory, primarily derived from common wealth literary criticisms and further nurtured by post-structural critiques (McLeod,
2007, p. 10; Moore-Gilbert et al., 1997, pp. 38 - 43), despite debates (Dirlik, 1996) and conceptual limitations (Shohat, 1996; Dimitriadis & McCarthy, 2001; Hall, 2006; Young, 2006), has begat discussions on discourse, representation, subjectivity, and nationalism. Post-colonial theory foreground the crucial role of discourses in cultural and academic domains (e.g. Said, 1979 & 1993; Spivak, 1997 & 1999). In particular, primarily through “scientific” and “common sense” claims, cultural and academic discourses have complicit association with imperialism and colonialism in their ways of rationalizing and sustaining the asymmetrical political and economic relationships between the colonial and the colonized. Accordingly, as Hoogvelt indicates (2001) social theory framed with a west-centric, linear historicity, such as Development and Modernization Theory, is draped with an imperial and colonial mindset.

A more thorough discussion of the strengths, weaknesses, and appropriation of post-colonial theories to this research will be presented in the following chapter. For the present, I should clarify that by quoting post-colonial theory as my major theoretical reference for educational policy analysis, I do not intend to embrace it totally because this research investigates a unique type of post-colonialization; one that requires the disentanglement of a complex and constantly transforming bundle of discursive routes of modernization (socialist Modernization or liberal Modernization), imperialism/colonialism, and nationalism. Because “the question of modernity cannot be addressed without accounting for the history of colonialism and modernization as products of the structural transformation from the colonial to the neocolonial” (Chen, 2010, p. 66), a critical scrutiny of a scholarship program designed for modernization must address its related imperial and colonial contexts. The connection of this particular history with an educational program challenges the assumption that an educational program is independent and value-free of its government’s interventions for modernization. In
practice, as one of the most legitimate apparatus of discourse reproduction, the terrain of educational policy is oftentimes contested by different discursive political and economic forces. The scholarship program for overseas studies, in particular, is not only contested by various powers derived from the domestic context but is also framed by international geo-political concerns, colonial legacies and other external forces. For instance, the discourses of modernization and social/national development, in fact can be seen to be embodiments of these various powers in the program.

**Methodology**

This research conducts an ethnography of discourse, appropriated from David Morley’s media studies. In the field of cultural studies, this approach, initiated by Stuart Hall in his *Encoding/Decoding Model* for media studies (1980a), is further developed by Morley in his sequential media studies to understand the ideologies embedded in a BBC news program: *Nationwide* (1986, 1992, 1999). In these studies Morley deploys textual analysis to reveal ideologies in the program in relation to the structure of program productions, and conducts focus-group interview with program audiences to interrogate their perception toward these ideologies. In the field of educational research, case study (e.g. Stake, 1995) and critical ethnography (e.g. Thomas, 1993; Madison, 2005)/reflexive ethnography appear to share similar methods of document analysis, interview, and observation to collect and analyze data – each with its individual philosophical assumptions and interests. For instance, while the philosophical assumptions of case study is constructivist (Stake, 1995, pp. 99-102); critical ethnography is strongly influenced by neo-Marxism, which stresses issues of political emancipation and ethical reflexivity (Thomas, 1993; Madison, 2005). When contrasted with Morley’s ethnography of discourse, case study and critical ethnography are grounded in the ethnographic tradition,
whereas Morley’s approach adopts a neo-Marxist sense of discourse concerned with social
class/positions.

Based on the proposition that truth is partial (Clifford, 1986), in this research I seek to
extend Morley’s approach by juxtaposing the interview method of conventional ethnography
with Norman Fairclough’s *Critical Discourse Analysis* (1995, 2003, 2006). In contrast to
Morley’s approach of discourse, this research is more concerned with the post-structural sense of
discourse that is attentive to productive and fluid power and how it is perceived by scholarship
grantees who have studied abroad, and how it may inscribe their consciousness and subjectivity.

Speaking to discourse analysis as an analytical framework, by no means could I skip
Michel Foucault’s groundbreaking, philosophical scholarship that explores the formation of
knowledge claims in relation to power (Foucault, 1972 & 1991). Foucault’s theorization of
discourse not only addresses the dynamic power dimension of knowledge (by examining
discourse within a set of statements and social practices), but also opens up an epistemological
Pandora’s Box for new possibilities in social science. One of the most substantial instances is the
development of discourse analysis, which sheds light on the present research.

At a practical working level, I borrow Fairclough’s working definition of discourse.
Fairclough, as a social linguist, is partially influenced by Foucault’s philosophical grounding of
discourse but is somewhat different from him. Fairclough considers discourses as abstract
entities that repeat and recur over time in various social sites (Fairclough, 2006, p.41).
Discourses reflect worldviews, including the “relations with structures of the material world,
feelings, and beliefs”. Discourses can be “projections or imaginaries” that underlie particular
actions or projects, which aim for particular results. Different discourses inherently reflect the
relations that different groups of people have to the world and to each other (Fairclough, 2003, p.
Fairclough’s Critical Discourse Analysis connects a micro linguistic and textual analysis to a macro analysis of social conditions and structure. He eloquently articulates the intimate and dynamic relationship between discourse, text, social cultural events/practices as well as social structure. Although Fairclough considers his own epistemological position as a “realist” one (Fairclough, 2003, p. 14), it has clearly been influenced by Foucault’s argument that structural and socio-cultural practices drive a particular discourse and further become a part of it.

In spite of fact that ethnography and discourse analysis are both under an overarching umbrella of qualitative research, conceptual differences between the two different worldviews have been a hotly contested issue. While ethnography, based on the philosophy of interpretivism, conventionally has been concerned with understanding and representing subjects’ culture and experiences, post-structural criticisms depart from ethnography by highlighting issues such as the artificial nature of cultural account in relation to representation and textualization of “the other”—usually the colonized (Clifford, 1986). Such lengthy criticisms have further advanced the emergence of reflexive and critical ethnography.

Mindful of these debates and potential issues, this research juxtaposes the two methods mainly for several reasons. First of all, generally both methods have their individual strengths and weaknesses. The identification of a particular weakness of a point of view need not degrade its strengths and potential contribution, although in some senses they both could be critical to each other. The two methods are not understood as an antagonistic binarism that is irreconcilable, but as a relationship that can strengthen one another. Their underlying worlds views could serve as distinguishing guidelines, rather than competing orthodoxies that allows the pursuit of truth from only one preferred perspective. Secondly, the necessity for employing critical discourse analysis in this research lies with its power to deconstruct linear historicity and
the progressive view of modernity, which are at the foundation of both (neo-)Marxism and Liberalism. Discussion of the discourse of the scholarship program in the context of the modernization in China and Taiwan, addresses two ideologies that represent different views of modernization (Chen, 2010). Post-structural criticism of modernity reveals how the two different discourses of modernization exerted their competing power, and were further fused with imperial/colonial discourse including nationalism. Furthermore, the significance of ethnographical interviews lies with its ability to provide a fundamental picture of scholarship grantees’ and policy makers’ experiences and perception toward the program, and also illuminates how particular discourses inscribe the experiences and shape the subjectivities of program participants.

In conclusion, the juxtaposition of the aforementioned methodologies enables the researcher to not only triangulate the results, but also provoke further dialogue if the research results prove to be contradictory. If each methodology portrays different dimensions of the scholarship program, then the two methods could provide data to identify intersections that can be claimed to be true and reveal other problematic knowledge claims. In brief, this juxtaposition of two methodologies aims to extend our understanding of the development of the program; and anticipates results that may reveal hitherto unseen complexities of the scholarship program, and enhance a more sophisticated discussion.

**Data Sources**

The information analyzed comes primarily from four sources. The first set is policy papers on the program, government documents, and other critical related government measures as reflected in statements and texts in Public Bulletins of the Ministry of Education and other
government departments such as the Legislative Yuan\(^5\) and the Executive Yuan\(^6\). The analysis of government papers provides an indispensable idea of the discourses in the scholarship program. The second data source is scholarly works on the scholarship program and on the policies for overseas studies, the examination of which deepens the analysis of the discourse by scrutinizing theories underlying the programs and policies. The third data source will be from interviews of scholarship grantees as well as policy makers/program executives. Five scholarship grantees studying abroad between 1955 and 2000 were identified by snowball sampling. Essentially, the interview data reflects grantees’ lived experiences of studying abroad and their perception towards the scholarship program. Additionally, experiences and perceptions of policy makers and program executives also provide another perspective of understanding. Moreover, interview narrative mirrors how a discourse could circulate among individuals and shape their perceptions of the scholarship program. The fourth data source will be from informal documentary evidence on this program and its policies from reports in major newspapers, grantees’ autobiographies, and documentary films. These resources not only provide a comprehensive portrait of the socio-political context/structure in which the discourses emerge, but also assist in our understanding of the linkages between individual experiences, discourses, and the broader international socio-political structure in relation to modernization.

**Significance of the Research**

The significance of this research has three dimensions. First, in terms of its theoretical contribution to education in relation to post-colonial theory, the research not only seeks to reveal the non-neutrality and political dependence of educational policy, but also provides an example

\(^5\) The function of Legislative Yuan is similar to the US Congress.

\(^6\) The function of Executive Yuan is similar to the US State Department.
of how various models of imperialism and colonialism have comprised a dynamic multi-lateral relationship between the US, China, and Taiwan in the scholarship program. I seek to portray Taiwan’s paradoxical, political condition as being competitively contested for by China and the US. Taiwan’s efforts at modernization have been influenced by the American liberalism. Meanwhile, the ideological struggles in the Cold War enabled the Chiang Kai-shek government to claim “Taiwan as the last fort of free China” and earned American support for its dictatorship. Similarly, the Communist Chinese government’s nationalism saw the Chinese Nationalist Party represented by the Chiang Kai-shek’s government as a rebellion, that supported its claim for sovereignty over Taiwan.

The second dimension of this research is its juxtaposition of critical discourse analysis and ethnography which provide an opportunity for triangulation of the data, but also may further the dialogue about the wisdom of utilizing two quite different methodologies to examine an educational program. As elaborated in the previous section, instead of being overwhelmed by the different underlying assumptions of two research methodologies, their juxtaposition in our examination of the scholarship program anticipates and welcomes paradoxes and debates. From the perspective of mixed-methods research, this study’s stance is between what Greene terms the complementary strengths and dialogical stance (Greene, 2007).

Finally, by examining the association between the development of a scholarship program and the modernization history of China and Taiwan, one that is filled with ideological struggles and discursive powers, this research may provide policy implications for international education by revealing socio-economic structural and political ideologies embedded in an educational policy and program.
This research seeks to enhance our understanding of the development of an educational scholarship program that has operated at the power confluence of three states. It also examines the ability of two diverse analytical approaches to increase our understanding of an educational scholarship program, by disentangling the complexity underlying the various socio/political/cultural forces at work. And finally, this research aims to stimulate more critical discussions for scholarship abroad program in relation to Taiwanese educational policy for internationalization.
Chapter 2

Post-colonial theory and Taiwan’s Scholarship Program for Overseas Study

Introduction

This chapter discusses the significance of post-colonial theory for understanding Taiwan’s scholarship program. It begins with a review of the research concerning the scholarship program as well as the fundamental reasons that underlie its development. Succinctly, a majority of the current studies presume that modernization was and remains the principal drive and goal of the scholarship program (Lin, 1976; Wang, 1980, 1992a, 1992b). The assumption of China’s need for modernization and Taiwan’s need for development leads to a set of questions. What is modernity; and what type of modernity did this scholarship program intend to pursue for the purpose of national and social development? How long must be this scholarship program continuing in order to achieve a satisfactory degree of modernization for national and social development in China and Taiwan?

In Western philosophy, the question of modernity and modernization has been debated extensively over several decades. Although at first sight the primary interest of this research is concerned merely with discourses in the scholarship program between 1955 and 2000, the unpacking of the discourses inevitably is involved in questions regarding modernity in Asia. Accordingly, in addition to reviewing the existing literatures of the scholarship program, this chapter also seeks to review concisely those social theories of modernization/development derived from liberalism and the criticisms put forth by (Neo-) Marxism, whereas the approaches of Liberalism and Marxism symbolize two major dominant approaches to understanding modernity rooted in the Western Enlightenment tradition and represent two different views of progress. By viewing the literature related to the discourses of these two traditions, one can
examine the inherent ideologies embedded in social theories. This attempt of critically reviewing the discourse of modernization for national and social development in the scholarship program in parallel with these two major traditions of modernization indispensably needs insights of post-colonial theory.

With this regard, the other focus of this chapter is therefore on reviewing post-colonial theories. To start with, I examine notions of four major post-colonial figures, Frantz Fanon, Edward Said, Homi Bhabha, and Gayatri Chakravorty Spivak. Nurtured by methods of psychoanalysis and deconstructive discourse analysis, as well as Marxists’s criticisms, these literary critics have extended analysis of uneven power relationships between the colonial and the colonized within politico-economic domains, and broadened the foci of liberal and Marxist traditions, to incorporate cultural concerns. By concentrating on concepts such as representation, subjectivity/identity, and nationalism, the post-colonial scrutiny of social sciences as well as cultural artifacts, they have revealed the complicit relationships between the Western-centric cultural discourses and imperialism/colonialism.

Although post-colonial theory could provide an adequate theoretical framework for this research in many ways, critics have pointed out that post-colonial theory can arrive in a blind alley due to its obsession with the polar discourse of “West and the Rest” (Hall, 1996b; Chen, 2002; Chen, 2010). This obsession also stops one from having a sufficient understanding of the complex dynamic, triple interactions of the US, China, and Taiwan, which underpins this scholarship program. The current socio-political condition of Taiwan has been debated by a group of literary critics within Taiwan. Whereas some of them argue that Taiwan has entered a post-modern era, others regard a post-colonial perspective as a better framework to understand Taiwan’s current cultural conditions and political identification. Moreover, critics such as Liao
Ping-hui and Chen Kwan-hsing, in recognizing the limitation of current post-colonial theory drawn upon West/Rest discourses, have proposed a different approach of understanding Taiwan. While the former calls for a collective intellectual and political effort to clarify a kind of *Emerging Modernity* in Taiwan (Liao, 1999), the latter regards the de-imperialization of Asia as the better perspective (Chen, 2010).

Taiwan is a promising case to ponder in an effort to refine contemporary post-colonial theory. The post-colonial theories developed by Fanon, Said, Bhabha, and Spivak, view the uneven central-peripheral power relationship as being between nations of the First- and Third-World. This study of Taiwan’s scholarship program takes a double-layered view. The first layer is the relationship between China, who considers itself as the spokesman of the Third World (Chen, 2002, p. 15), and Taiwan who is regarded as a developing state that wholeheartedly follows a free-market doctrine. From the Cold War to the present day, Taiwan has been seen as “a state without nationhood” (ibid) that has troubled the dominant discourse of Chinese nationalism. In the case of China/Taiwan relations, a Third-World country could easily exert its power over a developing state, although Taiwan has sought support from the First World in various ways, e.g., by integrating itself into the international society. The second layer of the question examines Taiwan’s dynamic triangular relationship with the US and China. Taiwan oftentimes has to negotiate between the positions of the two super powers. In this sense, central/peripheral should neither be conceptualized as a struggle between the First- and Third World, nor as a static pattern of tension between the colonial and the colonized. Rather, Taiwan’s case suggests that survival strategies have been developed in order to negotiate with the US and China and survive other relevant struggles between them.
The issues above appear to be about geo-politics and ideological struggles that barely have anything to do with a research of the scholarship program for overseas study. Nonetheless, educational policy functions at the interface of economic, political, and literary domains. As the examination of this scholarship program in the fourth chapter will demonstrate, a presumably neutral and value-free scholarship program in fact is a terrain contested by various discursive powers permeated with geo-political calculations and ideological struggles, such as power relations addressed above. The scholarship program thus presents a portrait of the dynamic interaction of these various discursive powers. At the same time, educational policy is itself an ideal realm for critical agency. To act upon this ideal further necessitates the understanding of these discursive powers and struggles since they provide the substantive foundation for reflexive agency.

**Studies of the Scholarship Program: National Modernization and Social Development**

Most of the literature concerning Taiwan’s educational policy and the scholarship program for overseas studies, discusses the history of why the early groups of students were sent abroad. The Boxer Indemnity Scholarship Program was established in 1907 for studying primarily in the US and other western countries, to contribute to the “modernization” of China (Lin, 1976; Wang, 1980, 1992a, 1992b). Since the Tsing Dynasty sent the first group of students to the United States in the late 19th century with the establishment of the indemnity program in 1907, the Chinese educational policy for overseas study has been strongly driven by the goal of modernizing China. In the early twentieth century, after being beaten in a series wars during Western imperial expansion, China felt an urgent need to acquire advanced Western technology and envisioned the program’s pivotal role pushing for modernization in China. In this sense, the

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7 The Boxer Indemnity Scholarship Program will be detailed in the following chapter.
students’ role in foreign countries was crucial in the modernization of China. One study even argues that, “modern Chinese history could also be seen as a history of activities of Chinese students who had studied abroad” (Wang, 1980, p. 10). Overall, these studies usually take a conventional historical view of grand narrative by documenting the institutionalization of the educational policy that promotes students in early republican China and Taiwan to study abroad. These literatures provide considerable details about the chronic issues surrounding the institutionalization of Chinese educational policies throughout the twentieth century. Nevertheless, what is rarely explored is the meaning of modernization and how long the process would take.

In recognizing the significance of “modernizing” China/Taiwan, some researchers have discussed the deficiencies of the scholarship program and how they have not enabled Taiwan to achieve the goal of “modernizing” China/Taiwan. Most of these studies have focused on general attitudes toward the scholarship program or its effectiveness and efficiency program in relation to its educational policy (e.g., Dai, 2004; Jseng, 1997; Yu, 2005; Liu, 2007). These studies document problems that diminished the effectiveness of the scholarship program, including grantees not offered positions that could enhance their contribution to Taiwanese society; too few grantees to create a significant impact on the modernization process; insufficient funding for overseas study; and inadequate incentives to encourage grantees to return to Taiwan. Although these studies contribute to our understanding the problems that prevent achievement of the program’s goals, what is lacking is a sustained inquiry of meaning of “modernization” and discussion of how modernization might be measured, or, the level of modernization that would be sufficient.
Other recent studies concentrate on the history of educational exchanges between the United States, China, and Taiwan (e.g., The Committee of Scholarly Communications with the People’s Republic of China, 1986; Jiang, 1980; Lee, 2006). Such studies usually consider the Indemnity program as the first step in the official cultural exchanges between the USA and China. These studies recognize the role of the program in improving and providing a better understanding of the Sino-American relationship, but neither examines the meaning of cultural exchange, nor the uneven power relationship that resulted in the exchange process.

Another body of literature, inclined toward ethnographic and historical approach, concerns the overseas experiences of scholarship grantees in the late nineteenth century and first half of the twentieth century (e.g., LaFargue, 1987; Bieler, 2004; Ye, 2001). These studies illustrate a more complex picture by discussing the initial cultural encounters of these grantees and their roles in cultural exchange between China and Western countries. In particular, they reveal a crucial issue confronting the grantees: the identification of the modern Chinese intellectuals educated in America. These struggles and challenges of the student generation in the first half of the twentieth century reflects a discontinuity and a rupture in the grand narrative of the scholarship program driven by the lofty cause of “modernizing” China. For example, in quoting one of his interviewees, Ye Weili indicates: “Modernization for the Chinese people has not been a ‘natural’ development, but a turbulent and painful process that involves the search for a modern yet still Chinese identity” (Ye, 2001, p. 6). Here, “the Chinese” and “modernity” seemed to be positioned in a contradictory manner. The implicit conceptual conflict between “modernization” and the Chinese although touched upon is not thoroughly discussed. Stacey Bieler (2004) similarly tackles the thorny issue of the roles of American educated Chinese students upon their returns in China. Through observing and discussing the American educated
Chinese intellectuals’ role in China throughout the twentieth until the early twenty-first century, she addresses the seemingly positive, but actually contradictory role, of how the Western educated Chinese intellectuals were treated by both Chinese and American society. Although these students were expected by the Chinese to contribute to “modernizing” China, oftentimes they were considered to be traitors by the Mainland Chinese. Americans on the other hand hoped that the US-educated elite students would become the spokespersons promoting American interests in China, although these students usually had to be loyal to the Chinese. As Bieler points out, “the students faced struggles of having dual loyalty to China as a nation and to the United States for intellectual and emotional reasons. Would China ever consider those who studied in the West to be loyal Chinese?” (Ibid, p. 16)

In sum, the literature pertaining to the scholarship program since 1907 covers a wide range issues, such as the origin and the institutionalization of the Chinese educational policy for overseas study, the grantees’ contributions, identification problems and the conflicting roles in China, as well as the efficiency and effectiveness of the program in relation to the educational policy for overseas study. Collectively these studies point to the role of the scholarship program in “modernization” and “development”. Seldom do these studies scrutinize the scholarship program in a critical way, in particular after its resumption between 1955 and 2000. By critically analyzing the discourses about modernization and development in the program, this study aims to increase our understanding of these discourses and their association with their contextual structures.

**Liberal Modernity: Development and Modernization Theory**

This section will discuss the Development and Modernization Theory by examining the ideas of Walt Whitman Rostow and Daniel Lerner. There are good reasons to use the two
scholars’ work. First, both present the best argument for supporting educational policy measures of developing countries, such as this national scholarship program of Taiwan during the Cold War era. Second, while Rostow uses the economy’s influence on American politics and its foreign policy, Lerner advocates communication as a tool of social development and transformation. Their work from different social science domains demonstrates how a general discourse of development and modernization rooted in a Western-model can permeate various social scientific domains that further rationalize and legitimize policy measures.

Walt W. Rostow argues for a linear, evolutionary economic development model (Rostow, 1960). Rostow’s analysis of the economic histories of several major civilizations identifies a five-stage-model of economic development: traditional society, preconditions for take-off, take-off, maturity, and high mass-consumption. In economic development industry and technology play a crucial role. Traditional societies either prepare themselves or are “prepared by external forces for take-off” (ibid, p. 17). Although the precondition for take-off can vary, it most commonly requires changes in political and economic structure, and in “effective social values” (ibid, p. 36). The concept of economic development is further advanced in a more holistic way that suggests an incorporation of multiple factors by including cultural, social, and political development. In this sense, it “recognizes that development involves not only economic change but also qualitative processes of social transformation” (Young, 2006, p. 53).

As a major consultant for the foreign policy of American President Lyndon Johnson, Rostow’s economic theory influenced American foreign policy in Southeast Asia after the Second World War. In one of his books articulating the significance of American aid and involvement in Asia Rostow points out that “the fundamental task of American foreign policy is to maintain a world which our form of society can develop in conformity with the humanistic
principles which are its foundation” (Rostow, 1955, p. 4). The American Aid-policy of technical assistance and loans in the Cold War era intended to assist with creating the preconditions for take-off. Eventually, the goal was “to see the underdeveloped countries of Asia through the take-off process into a stage where they are growing regularly out of their own resources” (Ibid, p. 44). Concerning the question of Taiwan, Rostow contended that America’s support of Formosa (Taiwan) had multiple meanings. In terms of economy,

Formosa could have an extremely useful economic role in Free Asia. The development of secure conditions for private enterprise on Formosa could draw Chinese capital, form Hong Kong and perhaps elsewhere, that is now unproductive or not as productive as it might be. Formosa agriculture, raw material, and industrial resources could be made to fit into a regional economic program. Formosa experience with high-productivity Asian agriculture could be helpful to other Asian areas in a technical assistance program (Ibid, p. 29).

Moreover, Rostow saw its political significance,

The United States guarantee of military protection for Formosa places this country before the world, and especially in the eyes of the Asian peoples”, squarely in a position of responsibility for Formosa’s future. This means more than merely Formosa’s future physical security from attack. For the watchful Asians, the social, political, and economic progress of Formosa will be a test of the purposes and effectiveness of American policy toward the Asian peoples. Thus, in making the decision to protect Formosa we have also made the underlying even if unspoken decision to meet a crucial test of our whole policy in Asia (Ibid, p. 24).

He maintained that American aid policy in Asia not only was economically necessary for America’s national interests, but also suggested the multiple uses of education as a political strategy. He supported educational exchanges between American and Taiwan for “…increasing efforts to provide for overseas Chinese students’ educational opportunities on Formosa” (ibid, p. 27).

Similar to Development Theory, Modernization Theory first came into being in the 1950s, soon after the Cold War began. It takes an evolutionary approach by offering a manual,
which underdeveloped countries can follow to become developed. Through a systematic transplantation of Western economic, technological, social, cultural, and political systems, underdeveloped countries could eventually become fully developed and advanced. Scholars such as Daniel Lerner, argued that through a transfer of capital, technology, and Western norms, the underdeveloped and developing countries could become modernized. Lerner maintained, “modernization requires a systematic ‘transformation of life ways’” and also suggested that “modernity is primarily a state of mind – an expectation of progress, propensity to growth, and readiness to adapt oneself to change”. He uses the examples of Japan and USSR insisting that the “Western model (of modernity) while historically Western; sociologically it is global” (Lerner, 1958, p. viii).

Development and Modernization Theory appear to provide substantial theoretical foundations supporting aid and involvement of developed countries/First World to the under- and developing third-world countries. They nevertheless have inherent problems. As Tucker points out, the assumption of Development Theory is that all different races and nations of the world were like a living museum of its economic history and that they will all evolve on the same line of the Western model of development. In order to pass through the same phases as had occurred in the history of Europe, their only way was to imitate the west (Tucker, 1999). Employing the western model as a standard paradigm brings with it its ethnocentric point of view (Young, p. 53). A similar ethnocentrism can be found in Modernization Theory. Although Lerner insists that his perspective “implies no ethnocentrism” (ibid, p. 46), “the modernization theories uncritically accepted the relationships between rich and poor countries that had evolved during the preceding epochs of capitalist expansion” and “merely provides a body of knowledge during the Cold War period for Western countries, as epitomized by the American Truman Doctrine in particular, to
advance the relationship between the colonized and colonial countries” (Hoogvelt, 2001, p. 35-37).

In short, the emergence and employment of Development and Modernization Theory in the contexts of two World Wars and the Cold War illustrates the intertwined relationship between the academy, public policy, as well as liberalism as an ideology, and serve as a background for the case of the National Scholarship Program of Taiwan. From a neo-Marxist perspective, the liberal approach of arguments only disguise neo-colonialism that reflects class-struggles expanded up to the global levels between the developed and developing countries, previously colonial first world and colonized third world countries. Now we shall examine the criticisms offered from a neo-Marxist perspective.

(Neo-)Marxist Tradition: Dependence Theory and Education as Cultural Imperialism

Marxist-Leninist critiques of imperialism and neo-colonialism by Pomeroy (1970) and Vakhrushev (1987) describe the export of social conflict of capitalist countries by way of expanding the social class conflict within a nation state to level of international “labor division” (Young, 2006). The critiques illustrate an invisible and extensive complex of economic, political, military, and cultural control by rich Western countries (previously colonial countries) over the poor newly independent countries (formerly colonized) in Africa, Latin America, and Asia.

After World War Two, scholars from the USSR and Africa (e.g., Nkrumah, 1965; Davies, 1987), Latin America, and Asia (The Government of the Republic of Indonesia, 1964) were heavily critical of Western neocolonial policies toward their nations. The scholars criticized how neo-colonialism, mainly from previous Western colonial countries like the USA, Germany, France, and Britain, utilized different strategies to further exploit previously colonized and semi-colonized countries – even after their political independence. Neocolonialism is manifested in
economic trade, aid programs, military alliances and weapon supplies, technical assistance, ideologies and political propaganda like democracy, freedom and anti-communism, to control the colonized and semi-colonized countries (Crozier, 1964; Nersesovich, 1972). The majority of the colonized and semi-colonized countries was in poor economic condition and found it difficult to reject such overtures. Dependence on such aid inevitably mired these nations in new and different forms of control. Neocolonial critiques view education as yet another instrument in the agenda of continued economic exploitation. Recent literature concerning colonial issues touch upon the manner in which African countries and their education systems are still dominated by programs such as foreign trade, study-abroad programs, aid programs, provided by international organization or support from Western countries (e.g., Makhurane, 1987; Mwaura, 2005).

In the 1960s and 1970s, a group of Latin American and neo-Marxist economists offered Dependence Theory as a challenge to Development Theory. They indicated that the development of the previously colonial countries occurred by economically exploiting the colonized countries. Those newly politically independent countries continued to be economically dependent on the colonial empires. Since it is the economic interest of the Western countries to accumulate capital by exploiting their previously colonized countries, there is no need for the Western countries to change their dominant relations with the colonized. Dependence theorists argue that advocates of Development Theory fail to acknowledge that the highly industrial growth of colonial countries actually is achieved by impoverishing them (Young, 2001, pp. 50-51).

With regard to America’s rising power after the World War Two, Martin Carnoy in his book, *Education as Cultural Imperialism* (1974), argues that education is utilized as a means not only for internal colonization, but for external colonization as well. He eloquently describes American educational policy in the third world as a combination of “humanitarianism and the
promotion of an economic development” that provides the poor people better lives (ibid, pp. 311-312). Therefore, rather than considering themselves as “imperialistic”, America and the corporations that are involved with aid-programs in the third world see themselves as assisting the poor to develop themselves (ibid, p. 308). Little mention is made of the fact that educational aid in different forms in the third world also brings commercial benefits to America.

In brief, criticisms in the neo-Marxist tradition challenge the asymmetrical economic interactions between the First World and Third World. Even though the colonized countries become politically independent, they remain economically dependent on various aids. Although the neo-colonial criticisms provide a persuasive rationale that critically accounts for the inherent oppressive power of the previous colonial countries to the colonized, this notion seems not to reflect many subtle and dynamic complexities in the interactive relationship between the colonial and colonized.

In comparison with the Development and Modernization Theories of the liberal approach, both (neo-)Marxist and liberal traditions emphasize analysis of economic structure in their examination of the relationships between the developed and the under-developed, the colonial and the colonized, and the First- and the Third World. Politics and other domains such as education and culture are awarded a secondary position that serves the economic structure. Beyond the differences between their individual perspectives, both posit a linear progress that can be traced back to the tradition of European Enlightenment. While the liberal approach foregrounds free-market and individual liberalism, neo-Marxism emphasizes the existing asymmetrical relationship between the proletariats and bourgeois. Therefore, their respective explanations about the international relationship, in particular between the rich and poor countries, go in entirely different directions.
Given that both approaches are developed from specific socio-cultural and economic-political contexts, they have individual strengths and weaknesses in their attempts to explain the contextual interactions within different research contexts. For the present research, both analytical approaches seem to be over-determined by static economic structures and pay insufficient attention to discursive power in educational and cultural domains. Inadequate attention also paid is to the human agency within structures (Ong, 1999). Citing such weaknesses is not done to degrade the significance of such economic and political analyses. Rather, it is precisely the recognition of their significance that further foregrounds the critical influences of analyzing discourses in relation to human agency in educational and cultural domains. In this respect, post-colonial critiques further manifest their crucial roles by extending the analysis to cultural terrains and unmask an entirely different scene of power relations between the colonial and the colonized that had been long covered by “scientific and knowledge claims”. Below I discuss about post-colonial theory in detail.

**Post-Colonial Theory**

There is general consensus that post-colonial theory is ambiguous in many aspects. Various scholars such as Dimitriadis and McCarthy (2001) and Young (2006) have elaborated on the challenges of unraveling the “postcolonial.” Others such as Hall (2006) and Shohat (1997) criticize the conceptual vagueness and limitations of the post-colonial concept. As Young notes, post-colonialism, in a strict sense, has never been a set of “deductions on the basis of a number of axioms, or of an abstract model applicable to an indefinite number of empirical descriptions” (2006, p. 64). Due to its conceptual vagueness, the challenges of unpacking post-colonial theory might best be served by starting with an overall definition.
In terms of theoretical genealogy, post-colonial theory derives from Marxism, but disagrees with the orthodox Marxist view of dialecticism and the role of culture in class struggles. Building on but diverse from orthodox Marxism, Post-colonial theory does not merely foregrounds the critical role of culture in sustaining economic and political hegemony, but also extensively develops the Marxist binary concept of class to a more complex one as “subalterns” (e.g. Guha & Spivak, 1988). Methodologically, post-colonial theory relies heavily on, but is not limited to, Lacan and Fanon’s psychoanalysis, Foucault’s notion of discourse and power/knowledge, and Derrida’s method of deconstruction to theorize on a wide range of issues on the interaction between the colonial and the colonized following decolonization. These issues, amongst others, primarily include representations in colonial discourse, colonial subjectivity, hybridity, diaspora, and displacement. Such a definition certainly is still ambiguous and actually unveils some inherent tensions within the field of post-colonial theory. These tensions are primarily the result of fundamental conceptual differences between orthodox Marxism and post-structuralism on certain issues such as the nature of power, discourse/ideology/knowledge, and the interplay between super-structures and base-structures.

This section begins with a brief discussion on the emergence of post-colonial studies commonly noted in Western academia and is followed by a review of some of the critical arguments of Frantz Fanon, Edward Said, Homi Bhabha, and Gayatri Chakravorty Spivak. Their concerns and theorization mainly include issues like representation in colonial discourse, colonial subjectivity, hybridity, ontology of the subalterns, as well as the crucial role of psychoanalysis and post-structural deconstruction as a methodology in these post-colonial theorists’ writings. This approach to post-colonial theory is not meant to diminish the
complexities involved, but to further contrast some critiques of post-colonial theory, for instance as a kind of “metropolitan post-colonialism” (Spivak, 1999, p. xii).

The critiques of post-colonial theory also imply on the need to integrate studies of post-colonial conditions in territories other than those colonized by the British and French. In concluding, the relevance of post-colonial theory to my study of the Taiwanese national scholarship program for overseas study and the potential contribution of the study to post-colonial theory will be discussed. Additional research on the colonized experience of East Asian countries to the current post-colonial studies will be suggested. If post-colonial studies are considered as a jigsaw puzzle of knowledge, then the experiences from various geographical and political contexts will be helpful in contributing to the field.

**Decolonization and three sources for emergence of post-colonial studies.** Imperialism and colonialism have various forms and take place in different historical contexts. There is internal colonization, as when European immigrants colonized the American Indians, and external expansion, such as the French and British imperial expansions and colonization in Caribbean America and South Asia (McLeod, 2007, pp. 7-9). Given the divergent forms and developments in various social and cultural contexts, this section attempts to briefly outline the dominant way of perceiving developments in post-colonial studies. Although this predominant perception by no means represents an absolute linear development of post-colonial theory, it at least facilitates in locating post-colonial developments in the Western academic context and further reveals its challenging nature.

In principle, post-colonialism can be connected through three sources: the study of Commonwealth literature, philosophy of Negritude (Francophone criticisms) and Anglophone criticisms of Africa and Caribbean, as well as theories of colonial discourse (Williams &
Commonwealth literature is a sub-category field of canonical English literature that examines literary works written in English from countries colonized by the British. This field of study engages in situating these literatures and identifying their common interests or some kind of unity based on the common colonial experience (McLeod, 2007, pp. 11-16). Nevertheless, there are increasing criticisms of the Commonwealth source due to its imaginary chimerical and alleged common benefits and suggest a need for an expansion and transformation of the field of study. It is in this context that post-colonial critique emerges and differentiates itself from Commonwealth criticism through its emphasis on “the tension between the imperial centre and colonial space” (Moore-Gilbert et al., 1997, p. 39).

The second source, less discussed in today’s post-colonial studies in Western academy but has been influential in Africa, the Caribbean, and America, is philosophy of Negritude. While colonial discourse oftentimes devaluates and stereotypes black culture and peoples, Negritude philosophy foregrounds and celebrates the invaluable quality of blackness and works with the question of nation. Although Negritude philosophy could be traced back to several early twentieth-century writers, e.g. Claude McKay and W.E.B. Dubois, two influential precursors of Negritude philosophy are Martinican poet, Aimé Césaire, and Senegalese poet, Léopold Sédar Senghor. Both of them, suffered from discrimination of French colonial discourse, argue for humanist projects of emancipating blackness in their writing poems and essays (Moore-Gilbert et al., 1997; McLeod, 2007). A thorough discussion about Negritude and other critics’ in the movement can go beyond the scope of this essay. At this point it might be more useful to briefly note the significance and arguments at issue of Negritude movement. First of all, it is no doubt that Negritude clearly plays a crucial role in terms of arousing awareness of oppressed people
and unifying them in the anti-imperial and anti-colonial development. Nevertheless, there are some criticisms of Negritude movement. For instance, it not only “inverts the terms of colonial discourses, upholds separatist binary oppositions”, but also tends to be “nostalgic for a mythic African past”. Eventually, these issues inevitably trope the further development of Negritude. (McLeod, 2007, pp. 81-83).

In addition to the above Francophone criticisms of Africa, there is another critical anti-colonial movement among Anglophone cultural critics of Africa and Caribbean. Diverse from the Francophone cultural critics’ poetic style, the Anglophone cultural critics tend to express their criticisms in novelistic style due British colonial educational pattern in Caribbean colonies. Commonly seen as a precursor for many other significant Caribbean cultural critics (e.g. Wilson Harris and George Lamming), the extraordinary Trinidadian writer, C. L. R. James, provided more sophisticated political and social observation and criticisms about European colonialism in Caribbean context. For instance, James, integrated his early experience of a cricket journalist, points out that Caribbean express attitude toward the British colonial through the games of cricket. Moreover, he maintained that the cricket games actually mirrors many class and ethnic issues within Caribbean society (Moore-Gilbert et al., 1997, p. 16). In addition to James, there are, among many others, also Barbadian critic such as Edward Brathwaite and African literature critics such as Ngugi Wa Thiong’o’s works that constitutes the early stage of anti-colonial movements and further exerts profound influence on the later post-colonial endeavor (Williams & Chrisman, 1994, p. 15).

The third and more popular source is a set of theories exploring issues relevant to the relationships between the colonial and the colonies, such as the representation and modes of perception used as intrinsic instruments of colonial power. Theorists, including Fanon and Said,
among many others, concentrate on problematizing the representation of the colonized in the colonial discourse (McLeod, 2007, pp. 17-22). Since the 1950s, Fanon had used psychoanalysis to eloquently address Algerian suffering caused by the French colonial discourse. Said’s works extensively addressed issues on colonial worldview and discourse shaped by this worldview in many European canonical literatures since the 1970s. In particular, Said’s *Orientalism* (1979) on colonial discourse raised popular awareness in academia and invited further theoretical endeavors and institutionalized post-colonial studies since the 1980s.

In terms of methodology of post-colonial theory, Said’s works, as the contemporary mainstream understands it, signifies the opening of a door in the academic world for a post-structural textual analysis integrating interdisciplinary perspectives, such as feminism, philosophy, and anthropology and which is notably differentiated from the previous anti-colonial efforts (McLeod, 2007, p. 23). The 1980s and the 1990s saw the burgeoning of post-colonial studies when theorists such as Bhabha, Spivak, and Robert Young further broadened and deepened the theoretical landscape of this field. Below I review the four major critics’ arguments.

**Frantz Fanon: Psychoanalysis of the negation of Other in colonial discourse.** Fanon, a French psychiatrist from Martinique, is recognized as one of the most critical theorists laying the foundation on scrutinizing racism and colonialism. His interweaving of Marxist political economy with psychoanalysis in explaining racism and complex identity in the colonial context advances later post-colonial concerns on the subjectivity of the colonized who were shaped by the negation of colonialism as well as the issues of nationalism.

In his book, *Black Skin, White Masks* (1952), Fanon extensively integrates his psychiatric expertise with a macro analysis of the colonized Black and the colonial White as well as their
relationship. Fanon maintains that the colonized Black man’s identity is formed through his relationship with the colonial White. The whole thesis of his notion about the Black’s identity could be described as “the negation of other.” As he noted, “The black man possesses two dimensions: one with his fellow Blacks, the other with the Whites” (Fanon, 1952, p. 1). In other words, the White is a referential framework for the Black. The constitution of the Black rests upon the White. The colonized Black’s identity is built upon the negation of the colonial Whites. In brief, through psychoanalysis Fanon takes account of how the powerful exclusion, imposition, and expropriation of colonial discourse have become constitutive elements in the identity of the colonized (Hall, 1996a, p. 118).

Fanon furthers the discussion on the interaction between the colonized African and the colonial French in his other significant book, The Wretched of the Earth (1963). He elaborates on decolonization, the necessity for political independence, and the importance of identifying national culture and forming national consciousness. Nevertheless, his re-configuration of “nationalism” is more alert to the dangers of a simple appeal to return to the “original identity and culture.” Fanon indicates that national consciousness should transform into a social and political consciousness and a humanism to avoid a dead end (Fanon, 1963, p. 144). He considers the decolonization of colonized African countries as a humanist project (Bhabha, 2004). The Wretched of the Earth could be conceived not only in terms of an ethical commitment and political declaration but also as a concrete action plan.

Although Fanon’s psychoanalytical approach to scrutinizing colonial discourse lays down a critical groundwork for post-colonial theory, his arguments are not presented without any problems. Critiques of his arguments (Moore-Gilbert et al., 1997, pp. 12-15) such as his legitimacy in representing Algerians and his understanding about his native land, and the
limitations of his theoretical immersion in European philosophy all seem to me resolvable. Nevertheless, the question of his militant approach to humanism, or more specifically, the question of humanism per se remains critical. For many anti-colonial critics, the Eurocentric humanism thatdeclaims its universality through imperialism and colonialism and further perpetuates them is considered a problem, not a solution. Fanon’s appeal to a new humanism through revolution and his claim of attributing the responsibility of creating a new humanism to an interconnected global society inevitably runs him into the trap of universal humanism.

**Edward Said: Representation and Power/Knowledge in Orientalism.** In *Orientalism* (1979), one of his most prominent works on post-colonialism, Said applies Foucault’s notion of discourse and power/knowledge to analyze “how” European colonial discourse perceives “the Orientals or the Other” in contrast to “the Occidentals” and forms a regime of knowledge: Orientalism. He argues for the necessity to examine the colonial “scientific study” about the Islamic world to understand how an academic discipline, an order of things, is established to manage and justify their colonialism ventures, including their political, military, ethical, and cultural strategies in the Islamic world. Orientalism, based on a Western worldview as also a kind of imperial gaze, not merely perpetuates Western colonialism, but was further perpetuated by it (Said, 1979, p. 3).

In *Culture and Imperialism* (1994) Said further critically scrutinizes several British, French, and American canonical literature works and argues that novels, as one literature form in cultural artifacts that emerged in most recent Western history, could best reflect the development of Western imperialism. The Western canonical novels and imperialism are overlapping territories with an intertwined history that cannot be understood and sustained without to some degree dealing with the other (Said, 1994, p. 71). This argument underlies the profound influence
of narrative. As he maintains, the battle of imperialism is not merely over land, but also over the power of narrative. Story telling, which asserts a cultural identity and people’s existence in histories, also become an instrument (ibid, pp. xii – xiii) that justifies and perpetuates imperialism and colonialism in an implicit fashion.

Said’s methodological strengths lies in his application of concepts like a structure of feeling (which he calls a structure of attitude and reference) (ibid, p. 62), contrapuntal reading (ibid, p. 66), and Gramscian hegemony (ibid, p. 109), to maintain that it is crucial to refer the narratives of the canonical novels back to the concepts and common experience where they draw support (ibid, p. 67). Through referring back, it can be recognized how the nineteenth and twentieth century European novels, as a cultural form, strengthened and articulated the imperial authority of the status quo. Said emphasizes the importance of reading this crucial aspect in novels, since the novel’s consolidation of authority not only functions as a way of “social power and governance,” but also, through “self-validating” in a narrative form, is “made to appear normative and sovereign” (ibid, p. 77). In this regard, Said is indisputably the first influential theorist systematically deploying “contemporary high theory, such as Foucaultian notions of power/ knowledge and formation of discourse,” to account for the inherent connections between (neo) colonialism and cultural production” (Moore-Gilbert et al., 1997, p. 22).

Homi K. Bhabha: Ambivalence, Hybridity and Mimicry. Originating from British India, Bhabha is also a literary critic at a prestigious university in the United States. In his book, The Location of Culture (1994), Bhabha characterizes colonial discourse in representing the Other as unstable and ambiguous. The vagueness, incoherence, and paradox within colonial discourse derive from the colonial attempt to reduce and maintain the colonized in relation to the colonizer. Bhabha asserts that “the process of ambivalence, as one of the most significant
discursive and psychical strategies of discriminatory power, gives the colonial stereotype its currency…and ensures the repeatability in changing historical and discursive conjunctures (ibid, p. 37).

*Hybridity* is another central theme in Bhabha’s post-colonial scholarship. Through this concept he points to a more complex and nuanced process of inter-inscription of the colonial and the colonized to each other. Drawing on the “negation of the other” in Lacan and Fanon’s psychoanalytical methodology (Moore-Gilbert et al., 1997, p. 33), Bhabha asserts that colonized and colonial subjectivity cannot be understood as static, rigid, and unalloyed. Based on his arguments on the ambivalent colonial discourse of the hybrid identity of the colonized and the colonial, it might not be difficult to understand his consideration of culture differences, rather than a static and fixed type, as a constant hybridized and fluid process (Bhabha, 1994, p. 233).

The notions of *ambivalence* and *hybridity* partially underlie his maintenance on the agency of the colonized as an indirect and intransitive kind – through an operation of mimicry. Drawing from multiple sources such as Lacan, Fanon, Derrida, and Foucault, Bhabha theorizes colonial mimicry as “the desire for a reformed, recognizable *Other as a subject of a difference that is almost the same, but not quite.*” Mimicry signifies a “double articulation” (Bhabha, 1994, p. 122). For Bhabha, one of the strategies used to discipline and normalize the *others* or the colonized is by enforcing imitation of the colonial. Nevertheless, because there are and will always be differences between the colonial and the colonized to distinguish between them, the process of mimicry will never come to an end. Difference and mimicry perpetuate each other since “the success of colonial appropriation relies on a proliferation of inappropriate objects that ensures its strategic failure, so that mimicry is at once resemblance and menace” (ibid, p. 123). Accordingly, the threat in mimicry is two-edged: it reveals the ambivalence of colonial discourse
and at the same time disrupts its authority. “The ambivalence of mimicry – almost but not quiet – suggests that the fetishized colonial culture is potentially and strategically an insurgent counter-appeal (ibid, pp.129-130). It is in this sense the resistant agency of the colonized is epitomized in an inherent fashion in that endless mimicry. The other resource Bhabha uses to account for the indirect resistance of the colonized is Derrida’s notion of Différance (2001) which articulates that meaning of language as signifier is always deferred and never fully delivered. Through this concept in discussing “Englishness” as a colonial authority, Bhabha maintains that “to recognize the colonial presence is to realize that the colonial text occupies that space of double inscription: hallowed/ hollowed” (Bhabha, 1994, p. 153-154). In the process of translating Englishness to a colonized context, the authority of colonial Englishness no longer contains British essences. In the mimic repetition and the structure of Différance, the language of power of the colonized is inherently implicated (Bhabha, 1994). In this regard, the mimic colonizeds are not entirely powerless. Not to mention that for the colonized speaking English cannot be considered only as their subservience to the colonizers, but actually enables them to speak back to the colonizer.

In spite of Bhabha’s articulation of ambivalence, hybridity, and mimicry as providing a micro, nuanced and complex account of the relationship between the colonial and the colonized, a major issue in Bhabha’s arguments troubling me is his general tendency to shift the anti-colonial focus of colonial coercion and exploitation to an “indirect/intransitive” resistance of the colonized that can be hardly substantiated. Even if it can be proved that the resistance of the colonized exists, it apparently is not powerful enough to change a condition where a colonial power is in the dominant position. Bhabha’s explanation tends to obscure the tensions as well as the uneven power interactions between the colonial and the colonized. As Aijaz Ahmad (1996) pointedly notes:
These celebrations of hybridity do not foreground the unequal relations of cultural power today; rather, intercultural hybridity is presented as a transaction of displaced equals which somehow transcends the profound inequalities engendered by colonialism itself. Into whose culture is one to be hybridized and on whose terms? (p. 290)

Ahmand’s critique sharply pointed to a potential issue of Bhabha’s notion of hybridity: distraction of the asymmetrical power relationship caused by colonialism to a seemingly harmonic phenomena. In this aspect, in acknowledging the significance of his notion, I agree with the arguments of Shohat (1996, p. 331) and Hall (2006) on the necessity to refine the concept of hybridity. Shohat mentions that there is a need to discriminate different modalities of hybridity, such as forced assimilation, internalized self-rejection, social conformism, etc. Hall’s argument in this respect is more cogent and in particular sheds light on Taiwan’s case. By contextualizing his individual position he points out that it is the diaspora and hybridity of Caribbean culture and identity that features in “the traumatic character of the colonial experience” (Hall, 1996a, p. 112).

Spivak: Deconstruct and the question “Can the Subaltern Speak?”. As a post-colonial theorist and feminist, Spivak’s works differentiate her from the other post-colonial scholars in at least two aspects. Firstly she articulates women as being doubly marginalized, and secondly she extends her concerns on the marginalized to the “Third World” countries (Moore-Gilbert et al., 1997, pp. 27-28). In her famous essay, Can the Subaltern Speak? (1988), she articulates one of the most controversial questions for the subalterns’ ontology and the fundamental question of human agency in a structure: Can they speak for themselves? Spivak points out that the core issue of this question is not whether women cannot speak as such or that no women-subject consciousness exists. The issue is that a woman is assigned no position of enunciation. Drawing upon the arguments of post-structural philosophers that the action of
'speaking' *per se* has been structured by a history of domination (Chow, 1996, p. 128), Spivak concludes that, “The subaltern cannot speak. There is no virtue in global laundry lists with ‘women’ as a pious item” (Spivak, 1988, p. 308). This argument is further extended in her challenge against First World feminism. In her criticism of Kristeva’s *About Chinese Women*, she points out that the plausibly benevolent efforts of First World feminists in representing and speaking for Third World women is an implicit exploitation in the Western self-constitution. In other words, she sees an inherent attempt of First World feminists in appropriating Third World women for their own ends (Moore-Gilbert et al., 1997, pp. 30-31).

In addition to exploring the possibility of subaltern enunciation, Spivak also engages with issues on the representation of subalterns/women in various social sciences, such as philosophy, history, and literature. In the field of philosophy, she reveals that the native informant’s perspective is foreclosed in the thoughts of Kant, Hegel, as well as Marx (Spivak, 1999, p. 110). In the arena of literature, through a Derridian deconstructive reading of three novels considered as nascent feminism in the nineteenth century, she teases out a complicit relationship of the nineteenth century feminism with imperialism/colonialism (Spivak, 1997). All of her reflexive efforts of deconstructing Feminism are actually rooted in her salient core critique: Western feminism has been failed in “de-hegemonizing” and “de-colonizing” its own underlying imperial and colonial presupposition. And one of the best instances is its presupposition about women being white, middle class, and heterosexual.

Spivak’s success in reflexively foregrounding the silenced subalterns and unmasking the predicament of the First World feminist evokes criticisms of her paradoxical position in grappling with these touchy issues. While her disclosure of colonial structures that mute the subalterns unmasks the features of colonial exclusion, her pessimism about the inability of
subalterns to speak for themselves seems to imply a powerless determinism. By the same token, her vigilance against First World feminist complicity with the predominant imperial and colonial discourses shakes feminist study on Third World women in the First World; nevertheless, this critique, in a strict sense, also indicates a gesture of speaking for Third World women (Moore-Gilbert et al., 1997, p. 32).

Spivak’s pessimism about there being no way for women/native subalterns to speak for themselves in their own voices seems to connote “a nostalgia or a sense of longing” (ibid, p. 47), which becomes particularly obvious when one considers her landowning family background. Chow’s answer to “Where Have All the Natives Gone?” is: All the natives are gone! (1996, pp. 124-126). An aspiration to have an original and authentic enunciation for substituting the colonial voice seems to implicate what Freud terms the Oedipal complex/Penis envy—a lack of something makes one envy and long for it. For Chow, the fascination of the native/subalterns actually mirrors a kind of “desire to hold on to an unchanging certainty somewhere outside our own ‘fake’ experience. It is a desire for being ‘not-duped’ which is a not-too-innocent desire to seize control” (Chow, 1996, p. 141). I would argue that Spivak’s emphasis on the colonial structure muting the subalterns might not necessarily equate with her defensive attitude towards the subalterns/native/Third World women. However, Chow’s critic of this potential longing reveals a paradox position that Spivak’s approach, or generally the approach of post-colonial theory, is oftentimes criticized—methodologically, a degree of sway between Marxism and Post-structuralism, and intellectually an ambiguity because of the displacement between the central and the peripheral.

**Post-colonial problematization of nationalism.** One issue of common concern in post-colonial theory is the question of nationalism. In addition to Fanon (1963, pp. 145-180) and Said,
several theorists also articulate that nationalism in both the colonials and the colonies is a product of discursive formation from various perspectives (Anderson, 1991; Hall, 1996b). Here I shall specifically address Anderson’s anthropological approach of theorizing nationalism as an *imagined community* not only because his theorization is one of the most systematic efforts elucidating the process of discursive formation of nationalism, but also because it provides a potential framework to understand the paradoxical relationship between China and Taiwan where “Chinese nationalism” has been used by the Chinese government to claim sovereignty over Taiwan, and to frustrate Taiwanese cultural and national identification.

Anderson’s primary thesis is that the contemporary conceptual formation of nation, nationalism, or nation-ness is a particular kind of cultural artifact (Anderson, 1991, p. 4) and “an imagined political community” (ibid, p. 6). He characterizes “the nation” as an imagined “limited” and “sovereign community.” By tracing several cultural and historical factors, such as the decline of Latin along with the rise of vernacular literature, the growth of the mass media, as well as the institutionalization of modern government techniques like censuses, maps, and museums, he illustrates how European and Southeast Asian nations formed their “nationalism.” In particular, his discussion on how material developments, such as census techniques, maps, and museums and the developments in imperial and colonial history, exerted profound influences on the conceptualization of nationalism in the colonial states of Southeast Asia (Anderson, 1991, pp. 163-185).

**Strengths, weakness, and contemporary debates.** The works of Fanon, Said, Bhabha, and Spivak not only shed light on certain critical theoretical issues, but also provoke a number of criticisms of post-colonial scholarship *per se*. Their arguments and theoretical and methodological strengths and weaknesses were discussed in relative detail in previous sections.
Here the whole post-colonial theory is located in a broader context and provides an illustration of the primary debates about the theory. From the theoretical perspectives, the strength of post-colonial theory lies not only in delving into many fundamental concepts such as knowledge, nationalism, subject matter, identity, agency, and representation that were taken for granted for so long, but also in its effort in going beyond dualism. From the perspective of methodology, the merits of post-colonial theory, largely influenced by post-structuralism, are its extensive application of deconstruction, discourse analysis, as well as psychoanalysis that highlights many central issues relevant to the post-colonial theorists. Post-colonial criticisms also raise questions of qualitative methodological foundations. The flip side of the methodological approach is its strong emphasis on literary criticism that pays more attention to cultural artifacts and less to the response of real subjects to these issues. These theoretical and methodological strengths and weakness of post-colonial theory also largely reflect the contemporary debates between the bipolar theoretical perspectives-- Marxism and post-structuralism (Williams & Chrisman, 1994, p. 6) -- or in Hall’s term, a degree of choices between episteme of a successive logic or a deconstructive one (Hall, 2006, p. 255).

**Theoretical strengths and weaknesses.** As discussed previously, the endeavors of the four major post-colonial theorists with these critical conceptual issues imply that the questions of representation, colonial discourse, human identity, and hegemony actually overlap issues like the nature of knowledge in relation to its methodology, colonial subjectivity, and agency, as well as ways in which power functions. These questions have been debated in the context of structuralism and post-structuralism in different ways. In this respect, it can be observed that post-colonial theory inherits the merits of the two approaches and go beyond dualism in two ways. Firstly, similar to post-structuralism, it is engaged in wiping out the rigid lines between
woman/man, colonial/colony, West/Rest…etc., constructed by colonialism based on structural thinking. Secondly, post-colonialism attempts going beyond Dualism. In criticizing European Marxist limitations of claiming a totalizing knowledge grounded on a Hegelian dialectic theory of history, Young (2004) indicates that post-colonial theorists translated Marxism out of this paradigm and reformulated the present tri-continental politics. Post-colonial narratives continue the anti-colonial struggles of the past but do not repeat orthodox Marxism that oftentimes is complicit with colonialism.

Generally speaking, criticisms of post-colonial theory primarily revolve around the conceptual ambiguity of the concept of “post-colonial” and its applications, the politics of location concerning its emergence, as well as its political meaning and relationship with the contemporary global economy. For instance, concerns about post-colonial theory become another monolithic theoretical framework that overlooks regional and historical differences. Spivak points out that the current trend in post-colonial theory seems in danger of constructing a new “general margin” (Spivak, 1996). By that, Spivak means that a close replication or transplantation of post-colonial theory developed by American academia to any “third world region” could lead to them becoming what they are meant to criticize: a new kind of Orientalism.

Similar to Spivak’s argument, Ella Shohat eloquently elucidates many problems of post-colonial theory in a more specific fashion maintaining that so-called post-colonial theory begin having their considerable visibility “in Anglo-American academic cultural studies in publications of discursive-cultural analysis inflected by post-structuralism” (Shohat, 1996, p. 323). By articulating the conceptual ambivalence of post-colonials in various dimensions, such as temporality, spatiality, and political significance, she questions the historical and de-contextualizing deployment of post-colonial theory. To her, imperialism, neo-imperialism, and
neo-colonialism continue unabated in many regions around the world and are not to be sidetracked by a term like ‘post-colonial’ which barely has any political agency. Shohat’s argument also acutely point to the one core challenge confronting post-colonial theory that it sets off to criticize: the politics of location – the Western outlook and representation of the rest of the world. Accompanying the emergence of post-colonial theory, immigrant intellectuals from the former colonies are now the legitimate groups speaking for their natives who continue, however, to be located in the political-economic struggle of neo-colonialism.

Echoing Shohat, Arif Dirlik, responds to her “when exactly does the post-colonial begin?” with a partially facetious but provocative response: “When Third World intellectuals have arrived in First World academe” (1996, p. 294). Dirlik’s primary criticism of post-colonial theory is not only concerned with its politics of location, but also with its failure to account for the development of global capitalism (ibid, p. 295). For Dirlik, post-colonial theory seems to merely symbolize a newly emerging power and influence of intellectuals from the Third World in First World academia. He points out the unique position of these intellectuals enable them to cast post-colonial criticism. As such, the term post-colonial since the mid-1980s as a new universalizing orthodox signifier of a global condition should be distinguished from a description of intellectuals of Third World origins. He indicates that by diverting from social, political, and cultural domination, post-colonialism is ideologically complicit in perpetuating the hegemony of global capitalism.

In addition to these harsh challenges to post-colonial theorization, there are also more open and optimistic perspectives that engage in analyzing the inherent density of post-colonial theory. For instance, drawing from what they call the feminist conjuncturalist perspective, Ruth Frankenberg and Lata Mani (1996, p. 346) discuss the complexity of the politics of location of
post-colonial theory. They interwove factors of temporality and spatiality of India, Britain, and the United States to articulate different meanings of post-colonial theory to these contexts. Accordingly, it is better to understand “post-colonial” in the context of the politics of location and a careful conjuncturalism (Frankenberg & Mani, 1996, p. 362).

Accordingly, it is better to understand “post-colonial” in the context of the politics of location and a careful conjuncturalism (Frankenberg & Mani, 1996, p. 362).

The other realistic but also positive view which I think is fitting as an adequate conclusion of theoretical criticisms of post-colonial theory is by Stuart Hall (1996). In his essay, When was the “post-colonial”? Thinking at the limit, he re-positions the endeavor of post-colonial theory as a convergence of global economy, world politics, cultural diaspora, as well as epistemological account for this converging complexity. For Hall, post-colonial theory inherently does have deficiency, but actually also engender possibilities. Firstly, Hall practically recognizes the ambiguity of post-colonial theory and its potential dangers, and therefore argues for a vigilant discrimination of different post-colonial narratives between various social and racial formations in terms of their relation to the imperial centre. Moreover, Hall argues for the value of a post-colonial theory. He maintains that the significance of post-colonial theory is in its descriptive value that features “double inscription” and theorization of diasporas and displacement. It rejects the binary perspective of “here and there, then and now, home and abroad, centre-periphery, global and local,” and attempts to capture and portray a multi-axial dynamism of cross-relations that communally reorganize and reshape a relationship conceived out of the binary approach. Owing to the plethora of current issues, Hall further contends that post-coloniality “represents a response to a genuine need, the need to overcome a crisis of understanding produced by the inability of old categories to account for the world” (Hall, 1996, p. 257).

**Methodological strengths and weakness.** To a large extent, the strengths and the weaknesses of post-colonial theory owe much to its methodological approach. The understanding
of “the term postcolonial refers to not simply a periodization, but rather to a methodological revision which enables a wholesale critique of Western structures of knowledge and power, particularly those of the post-Enlightenment period” (Mongia, 1996, pp. 1-2). This methodological revision means the deconstruction of the post-structural approach in addition to psychoanalysis. Post-colonial theorists extensively deploy Derrida’s deconstruction and Foucault’s notion of discourse, power/knowledge, and subject position to reveal and challenge inherent problems of knowledge production systems in relation to methods rooted deep in the spirit of European Enlightenment such as ethnography and anthropology. The post-structural and psychoanalytical approach in post-colonial methodology discloses inherent issues of objective representation of “othered” subjects, constitution of subjectivity, and their relationship with formation of knowledge. In other words, research is always political and moral (Denzin & Giardina, 2007). This revelation also challenges the foundation of qualitative methodology and alerts qualitative researchers to not only be more vigilant to the influences of qualitative research methods but to also appeal for methodological decolonization or the emancipation of indigenous people through performative methods (Denzin 2008).

Similar to criticisms of post-structuralism, the deconstructive and discourse analysis method of post-colonial theory usually become the questioned target by Marxists. As seen, the unfolding of post-colonial theory has been closely linked with English literature and the primary post-colonial figures are English literary critics. Additionally, it is apparent that the principal analyzed objects are cultural artifacts such as novels, and social and philosophical texts, rather than human subjects. This strong literary-critical tendency largely dismisses the other critical method that could probably bring in different insights: ethnography. It might not be difficult to understand that this dismissal is partly due to post-colonial critiques of the inherent problems of
representation in ethnography. Nevertheless, for many qualitative researchers, the focus on discourse and storytelling neglects the “lived experience,” and takes us from the field of social change (Snow & Morrill, 1995, quoted in Denzin & Lincoln, 2008, p. 17). This view is actually also similar to the Marxist criticisms of a sense of nihilism and “value-freeness” of the post-structural stance. For many Marxists, the deconstructive- and-discourse analytical approach not only obscures the real focus of political-economic struggles and shifts it to cultural hegemony, but also downplays the role of the person as a conscious and active human agency; although, in reality, for many who apply post-structural methods of discourse and textual analysis, one of their pursuits is also to reveal how discursive power works and attains a hegemonic condition.

In my opinion, both ethnography and discourse analysis have their respective strengths and weaknesses. Ethnographic works have long been criticized for their heavy dependence on subjects and the nuanced and complex power relationships between researcher and the researched (as post-colonial theorists have maintained). Although this reliance aids researchers in seeing what constitutes lived experiences of the subjects, it does not demonstrate how they become what they now are: disciplined subjects. In terms of discourse and textual analysis, if subjects are constructed and formed by discourse and could be reflected in textual works as the proponents of post-structuralism or post-colonialism contend, then interviewees’ narratives certainly can also be seen as the best site for fieldwork and to provide evidence supporting their claims. Not to mention that from the post-structural view, discourse analysis or deconstruction, in a broad sense, can be deployed not only for literary works but also everywhere, including ethnography such as in interviewees’ narratives. As such, I propose combining the ethnographic and discourse analysis in my research project. I will further elaborate this in the third chapter on
methodology. Before drawing a conclusion to this chapter, I shall also present the discussions on the contemporary condition of Taiwan.

**Post-colonial debates in Taiwan.** Use of the discourses of Post-colonial theory to understand the cultural and literary conditions of Taiwan was firstly brought into discussion in 1992 as Chiu kui-fen, a literary critic, in her conference paper, *Discovering Taiwan: Construct Post-colonial Discourse of Taiwan* (Fa xian Taiwan: Jien gou Taiwan hou zhi min lun shu; 發現臺灣：建構臺灣後殖民論述). In that paper Chiu discussed using Western post-colonial critiques to position and clarify Taiwan’s contemporary literature development and local cultural conditions (Liao, 1999; Chiu, 2000; Encyclopedia of Taiwan, 2010). Based on Homi Bhabha’s concepts of hybridity and mimicry, Chiu suggests seeing Taiwanese Mandarin Chinese as product of a multi-cultural syncretism resulted from the particular historical and cultural contexts of Taiwan (Chiu, 2000). Although Chiu’s argument primarily departs from a concern with nativism that privileges only the Min-nan ethnic group, her post-modern orientation is challenged by another major literary critic, Liao Chao-Yang. Liao criticizes Chiu’s cultural

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8 Min-Nan, also is called Hoklo, is a major ethnic group in Taiwan that constitutes seventy percent of population in Taiwan. This group has their immigrant ancestry from southeast China several hundred years ago. In addition to Min-nan, there is Hakka group that constitutes fifteen percent of the Taiwanese. Hakka group also came to Taiwan several hundreds years ago from southern China. The rest of Taiwanese people are consisted of thirteen percent of Chinese coming along with Chiang Kai-shek Chinese Nationalist Party and two percent of indigenous people that can trace their roots back to south and pacific Asia. The two percent of indigenous groups is further categorized into ten different tribes. The ethnic classification is only a strategic reference to understand the diversity and diaspora in Taiwan.
syncretism as one that is inevitably compromised by using Mandarin Chinese as a major tool of articulating Taiwan, since Mandarin Chinese was a native tongue of only thirteen percent of people in Taiwan and became the official language through the imposition of Chiang Kai-shek’s colonial regime. Chiu further claims that using Mandarin Chinese not only neglects other ethnic groups’ rights for articulating their identities with their native tongues, but also implicitly supports the colonial regime (Liao, 1999; Chiu, 2000).

The debates between Chiu and Liao, like a pebble ruffling in a small pond, further provoked sequential debates and discussions on locating and articulating Taiwan’s current situation. Overall, these discussions, drawing inspiration from Western post-colonial theories to analyze Taiwan’s literatures and historical development, primarily circle around two issues (Chiu, 2000). First, what is the contemporary condition of Taiwan: a post-modern, a post-colonial, or is it still colonial? Second, what of the conceptual entanglement of subalterns, e.g. class and the colonized within Taiwan’s societal context. While some critics, in spite of their different referential points of view, see Taiwan as a post-colonial society (e.g. Chen, 2002, p, 15), still others consider Taiwan as a post-modern society due to its multiplicity as well the conflation of Chinese, Japanese and American cultures blended in Taiwan’s popular culture (Chiu, 2000; Liao, 1999). At the same time, in recognizing the limitation of post-modern and post-colonial discourse, some other critics suggest a different framework to describe Taiwan’s condition. For instance, Liao calls for a collective effort for constructing An Emerging Modernity that could more sophisticatedly and eclectically clarify the contemporary cultural and social condition of Taiwan (Liao, 1999); or more generally, for Asian condition, in Ong’s words, an “Alternative Modernity in Asia” (Ong, 1999).
The challenges of defining and locating Taiwan’s contemporary ambivalent condition lie not only in the inherent conceptual vagueness of post-colonial theory as such, but also in the multi-layered tasks of identifying and decolonizing discourses which are legacies of the (previous) colonial and imperial masters, e.g. Japan, Chinese nationalists, and America. For example, for the Chinese immigrants came along with the Chiang Kai-shek regime to Taiwan, Taiwan post-coloniality started from the moment Japan returned Taiwan to the Republican China represented by the Chiang Kai-shek’s Chinese Nationalist Party. However, this prevailing Chinese-centric discourse is inaccurate (Chen, 2002, p. 14), since for a majority of the Taiwanese people, the post-colonial era started from 1987, when the thirty-eight-year-long Martial Law imposed by the KMT regime was denounced in Taiwan; Or even later when the Democratic Progressive Party (that speaks for a Taiwanese nationalism) won the presidential selection. The Chiang Kai-shek regime can be seen as brutally colonial when one takes into account the history of the slaughter of KMT when they retreated to Taiwan. A Chinese-centric discourse imposed by the Chiang Kai-shek regime prevented the formation of Taiwanese subjectivity (ibid). The complexity caused by these various perspectives of articulating post-coloniality and Taiwan’s subjectivity is further complicated by issues such as: how to de-colonize these imperial and colonial discourses without replacing them with a new one, shaped mainly by Min-nan ethnicity.

9 In 1895, the Chinese Tsing Dynasty ceded Taiwan to Japan after the First Sino-Japanese War. For Chinese Tsing Dynasty, Taiwan had never been seriously considered as a part of China, while Japan considered Taiwan as one geopolitically significant location in developing its imperial expansion. In 1945, Japan returned Taiwan to the republican Chinese government led by Chiang Kai-shek.
(which concerns Chiu); as well as the ongoing political uncertainty between Taiwan and China who also is currently undergoing dramatic socio-political changes.

Given the concerns of this research, it might be useful to view the discussions of Taiwan’s post-colonial condition as falling into two categories: the internal and external post-coloniality – while temporarily focusing on the latter one for this research. However, Taiwan’s case is an interwoven bundle of internal and external colonization quite like a two-sided coin. For looking at the external post-coloniality of Taiwan, I shall briefly discuss Chen Kwan-hsing’s argument: using Asia as a method. By tracing back to the Cold War era, Chen maintains that the current post-coloniality not only in Taiwan but also in Asia is a legacy of the Cold War era. De-colonization and de-imperialization in Asia therefore should be discussed together with the Cold War in Asia. Chen contends that due to the particular history and geographical context of Taiwan it has been determinedly formed by the political and economic dynamics of East Asia history. This uniqueness makes Taiwan serve as “a perfect compression of the region’s modern history”. Therefore, it would be helpful for understanding the decolonizing/deimperializing/de-cold-war in Asia to locate Taiwan as a strategic focus. This enables us to “go beyond the limits of national and nationalist historiography” and thus reveal “the transnational dynamics of the region”. Moreover, “using Asia as method”, also means “shifting point of analytical reference”, since scrutinizing Taiwan’s condition by thoroughly referring to other East Asian nations could help one see Taiwan and other East Asian region in a different way (Chen, 2010, p. xii). I shall conclude by articulating the relevance of post-colonial theory to the research of the scholarship program.
The Relevance of Post-colonial Theory to the Present Research

An ethnography of discourses of the national scholarship program should not be conducted without a basic understanding of Taiwan’s experience of multiple imperialism and colonialism, since the historical legacy of imperialism and colonialism undergirds the purpose of the scholarship program to “modernize” and “ensure Taiwan’s national sustainable development” by sending students to Western countries. Meanwhile, questions induced by analyzing these discourses are the scholarship grantees’ agency – including their experiences of overseas studies and perception toward the discourses. To tease out the complexity of discourses in this educational program entangled with modernization, education, ideologies, this section articulates the relevance of post-colonial theory to my research from three aspects: the rationale for using post-colonial theory instead of neo-colonial criticisms or Development/Modernization Theories, as the theoretical framework for research on the scholarship program; the relevance of post-colonial theory to this research context; and the contribution of this research to contemporary post-colonial theory.

My concerns with Taiwan’s post-colonial condition are well represented by Hall’s suggestions for identifying various kind of post-coloniality in different contexts (1996b, p. 146). As elaborated in last section, discussions about Taiwan’s post-colonial condition have provoked debate on which period should be treated as Taiwan’s colonial era. Furthermore, from an international perspective, the constant jostling for political power and the maneuverings by China and the United States with Taiwan translates into a form of imperial coercion and subordination. The main concern of this research is with the relationship between China, US and Taiwan, as it relates to the scholarship program. Mongia and Hall both indicate the post-colonial narrative is less about periodizations or epochal stages than about characterizing a condition of
double inscription by colonial history, for both the colonials and the colonies, post-colonial theory seem to be able to serve as a more adequate referential framework. Especially, while a neo-colonial or imperial account could describe political and economic hegemonism of the US and China over Taiwan, it principally focuses on a binary struggles either between China and Taiwan, or between the US and Taiwan, and provides less of an explanation for the dynamic and productive power interaction among the three entities. In this sense, post-colonial theory also provides a more debatable and therefore generative space to extensively explore Taiwan’s case, although there is a general tendency in contemporary post-colonial theory to focus on the discursive relationship of the West and the Rest (Hall, 1996b).

Particularly speaking of the context of the present research, the relevance of post-colonial theory lies in matching the primary concerns of researching the scholarship program for overseas study. Since the research is concerned with issues such as discourse, representations of Taiwan in policy and other documents, the subject of scholarship grantees, and the Taiwanese people, post-colonial critiques provide a comparatively more acceptable conceptual framework to this research context. Additionally, the methodological approach of post-colonial theory also sheds light on conducting this research. Until now, much of the research on this scholarship program is concerned with administrative issues and the efficiency of conducting the program. As such, research that interrogates the discourse within and about the program provides not only a diverse view of the program but also an account of the functioning of Chinese, American, and Taiwanese power relationships. With this post-colonial theoretical framework as background, issues to be addressed include: whether the Taiwanese as subalterns can speak for themselves through those scholarship grantees; whether Taiwan, constantly treated as a chip in the geopolitical agenda, has the space to speak; and, whether there exists an authentic Taiwanese native in a situation where
China which claims it is the “authentic political and cultural representative.” In Spivak’s sense, there is no space for Taiwan to speak. Not even in the academic world could scholars doing research on Taiwan have any position to advance. As cultural critic Shih (2003) rightly pointed out, it has been impossible to have studies on Taiwan as they have been written out of a Western (American) discourse due to Taiwan’s small size, its marginality, or in other words, its insignificance. Because Taiwan was not colonized by the British or the French, but by Japan and subsequently by another Chinese regime supported by the United States, Taiwan’s experience with colonization has never been subject to mainstream post-colonial studies except in the context of understanding the political dimensions of China. In this aspect, post-colonial concerns about how power/knowledge works has great validity.

Regarding the contribution of this research to post-colonial theory, I shall be clear that in foregrounding the applicability of post-colonial theory to this research context, I do not imply that post-colonial theory can be applied unquestioningly. In fact, some questions provoked by the application of post-colonial theory in this research could be regarded as the contribution of this research to post-colonial theory. The first contribution is an exploration of a kind of post-colonial condition in East Asia. This point regresses to my first point on some critics’ argument about the necessity of discriminating post-coloniality in individual historical and regional contexts. As explained in the last section, Taiwan’s post-colonial condition is not a static power relationship between two entities - the United States and Taiwan - or in Hall’s criticism of the discursive model of West/the Rest. Rather, the post-colonial condition consists of the power relationship between China, the United States, and Taiwan. Whereas the former two usually consider each other as “the primary Other,” Taiwan, often deemed a pawn in geopolitical games between China
and the United States, can by no means directly resist either. This is a good example of an approach complicating the simple binary West/Rest model.

The other contribution of this research is a further expounding of the issue of the politics of location within post-colonial theory. In particular, the criticism of the discursive trend that generalizes the condition in the Third World and the advocating of additional studies on the post-colonial phenomena have, I believe, double sided implications. While the criticism points to an overly simplistic generalization of post-colonial theory, it simultaneously and paradoxically mirrors its own privileged position that posses the defining power of what studies are subject to post-colonial studies. Studies of East Asian cultural hybridity and diaspora resulting from previous colonial history are an example. In fact, such studies have been burgeoning in the past decade although most of them focus on regional studies, such as Asian studies. There could be many possible factors precluding study on the post-colonial condition of East Asia from a metropolitan post-colonial theory. An implicit but profoundly influential reason could be the lack of a different/non-Western perspective towards the East Asian condition. Moreover, in most prominent discourses, the West is always the colonial and the imperial and the Rest are always the colonized. Therefore, studies focusing on politico-economic struggles between Western imperialism/colonialism are more visible than studies that deal with non-western imperialism/colonialism. This discursive model further excludes the possibility of scrutinizing other non-Western colonial/imperial powers and their relationship with their peripheral others, such as China and Japan, and their imperial and colonial power on their Others who might be of similar racial groups and share similar cultures with them. The discursive framework of the West/Rest has readily neglected studies on the post-colonial condition in East Asia and
subsumed them to regional studies since they don’t fit in this binary model and are considered irrelevant to the West.

The focus of the research is on the scholarship program, an educational strategy initiated by the United States in the early twentieth century to allow China to “absorb advanced Western technology”. It subsequently became a strategy through different discourses such as modernization, development, and internationalization, to enable Taiwan to connect with Western countries, particularly the United States, with which it shares a similar ideology. However, it is Taiwan’s particular geopolitical location, its complex ideological relationship and tensions with China and the United States, and other contingent historical factors intertwining the Taiwanese national scholarship program for overseas study that calls for and could contribute to the formulation of post-colonial theory.
Chapter 3
Ethnography of Discourse

Introduction

This chapter elaborates methodology deployed in this research: Ethnography of discourse. By that I intend to combine critical discourse analysis and interview methods of ethnographic sense. Ethnography of discourse or discourse ethnography can be discussed from two perspectives. The first one, in a more general sense, is a critical reflexive approach in qualitative research, primarily influenced by Neo-Marxism and post-structuralism. The second one, specified in the field of cultural studies, is a critical methodology that combines critical textual analysis and ethnographic method to interrogate ideologies embedded in a text and subjects’ perceptions toward the texts (including the contained ideologies). Similarly deriving from critical tradition, both perspectival streams are concerned with Western philosophical questions about structure, subjects and their voices, knowledge, ideology, discourse, as well as the complexities of their intersections. The slight difference is whereas critical ethnography, from the field of ethnography, extensively incorporates the concept of discourse to scrutinize and later transforms ethnographic works, ethnography of discourse, from the field of cultural studies, invites ethnographic methods to complement their works of tracing ideology in people’s daily life experiences. Given that my approach is closer to the latter one, I shall briefly explain the first one and focus more on the second one. The attention will be paid mainly to how ethnography of discourse is defined in the research and deployed to my research on Taiwan’s national scholarship program for overseas study through combining ethnographical method (e.g. interview) and Norman Fairclough’s critical discourse analysis. Additionally, through articulating issues and merits of mixing methodological approach I also argue that a mix-
methodological approach of ethnography of discourse could more appropriately present the
dense, thick, and sometimes paradoxical complexity at the intersection of discourse in the
scholarship program, historical condition producing the discourse, and policymakers/grantees’
perceptions of the discourse.

**Issues of Representation, Subject, Discourse, Power/Knowledge in Ethnography**

The development of qualitative inquiry methods has historically been both diverse and
disputative. Locating the qualitative research practices in North American academic contexts,
Norman K. Denzin and Yvonna S. Lincoln distinguish eight phases since the initial
developments in the early twentieth century (Denzin & Lincoln, 2008). They are individually:
the traditional period (ca. early 1900s-1950), Modernist phase (ca. 1950–1970), Blurred genres
(ca. 1970-1986), Crises of representation (ca. 1986-1990), Post-modern period of experimental
contested moment (2000-2004), and Now and future (2005-) (ibid, pp. 18-28). Distinguishing the
eight stages reveals the contemporary diverse approaches within the field of qualitative research.
Moreover, it allows one to see the trend of incorporating post-structural sense of semiology and
discourse analysis within the field of qualitative research sprouted from the “blurred genres” of
the 1980s. Indeed, along with dissemination and penetration of social sciences and inquiry
methods to each other, research methods and different paradigms begins multiplying and
interbreeding, so that some paradigms previously considered as irreconcilable now may become
informative to each other and integrated in a new paradigm (Guba & Lincoln, 2008, p. 256).

Influenced by post-structuralism, the critical ethnographical approach starts with a group
of cultural critics’ ethnographical works of ethnography (Van Maanen, 1995, p.17) that
problematises many fundamental issues in ethnography such as languages, narratives,
interpretation, and representation, power relationship between the researcher and the researched, and ethics in conducting and writing up ethnography (e.g. Clifford & Marcus, 1986; Clifford, 1988). Researchers who employed discourse in ethnographic works extensively applied methods deriving from, to name a few, Derridian concept of *Deconstruction* as well as Foucaultian sense of *Discourse, Power/Knowledge, governmentality, Archeology of knowledge, and Genealogy*. Strictly speaking, post-structural philosophy rarely applies these concepts in a practical way, except for Foucault’s efforts of deploying these concepts to trace several modern institutionalized conceptualizations such as madness, sexuality, and prison (e.g. Foucault, 1965, 1978, 1979). Undoubtedly, these post-structural concepts not only shatter the epistemological foundation of a conventional ethnography methodology, but also transform the perspectives, interests, and practices of some ethnographers’ works.

Post-structural (and post-colonial) thoughts challenge how researchers (usually from colonial/dominate class) represent the researched (oftentimes in a colonized/marginalized) through a “gazing power” of scientism that sometimes is implicit within imperialism or colonialism. In this research process, the researched is objectified, analyzed, and constituted through researchers’ narratives, stories, and accounts (as a kind of discourse). These narratives and stories, perceived as a kind of scientific knowledge, oftentimes reflect researchers’ individual perceptions, imagination, or projections structured by a dominant discourse. Such “scientific discourse” inevitably is complicit with imperial or colonial discourse, and further perpetuates imperial/colonial/dominant power. Deconstruction, as one major tactic, is often deployed to blur Binarism —a legacy of Modernity. Being mindful about these inherent issues provoked by post-structuralism, ethnographers in this approach ask reflexive and self-critical
questions, that also adjust their research practices and further change the landscape of qualitative inquiry.

**Ethnography of Discourse in Cultural Studies**

In the field of cultural studies this integrative methodological approach is initially proposed by Stuart Hall in his model of encoding and decoding for media studies (1980a), and further deployed by David Morley in his sequential media studies (1986, 1992, 1999) to understand the ideology contained in a TV program in relation to structure of program production and audiences’ perception toward programs. The premise of this approach is that “texts cannot be considered in isolation from its historical conditions of production and consumption” (Morley, 1980, in Morley & Brunsdon, 1999), since eventually text and audience are not only inseparable, but also constituent to each other (Nightingale, 1996).

**Encoding and decoding.** In his essay *Encoding/Decoding*, Hall (1980a) points out that traditional mass-communication researchers considered the process of communication as a linear process: a circulation circuit or a loop consists of sender, message, and receiver. This linear model focuses too much on message exchange, but not on how messages are structured and coded at different “moments” and their relations with different moments as a complex structure (Hall, 1980a, p. 163). In his model of encoding/decoding, Hall suggests that we view the process of communication as “a structure produced and sustained through the articulation of linked but distinctive moments: production, circulation, distribution/consumption, and reproduction”. This perspective considers the process as a “complex structure in dominance, sustained through the articulation of connected practices, each of which, however, retains its distinctiveness and has its own specific modality, its own forms and conditions of existence” (Hall, 1980a, p. 163). The identification of different moments of messages, in a form of discourse, reminds us that
production of texts may be different from the perception of it. Due to factors such as frameworks of knowledge, relations of production, and technical infrastructure at the pole of coding/text production are different from those at the pole of decoding/text perception (Hall, 1980a, p.165). Encoding and decoding might be related, but there is no necessary correspondence between them. He then foresees the promise of audience research in media studies. Hall further articulates the role of language in communication process. He argues that meaning/code in a message is inevitably influence by structures and language. The gap between encoding and decoding lies not only in the difference between the structure of encoding and that of decoding, but also in the elusion of language per se, or more precisely the code contained in language. In the end, Hall identifies three hypothetical orientations of decoding: dominant-hegemonic, negotiated, and globally contrary (Hall, 1980a, pp. 172-173).

Hall’s model of encoding and decoding attempts to integrate British culturalism and European structuralism (Hall, 1980b). While the former considers the historical subject as acting and reflexive agent conditioned within historically defined conditions, the latter conceives the historical subject of “signs of social structure” (Nightingale, 1996, p. 51). Hall’s model offers a possible resolution to problems like discourse, the nature of subjectivity, and the role of ethnography in response to socio-cultural criticisms (Nightingale, 1996, p. 22) by taking a structural view mixing a semiotic research paradigm. His distinction of each related stage – structures of production, text, and audience reception, within a message circulation framework proposes a way of analyzing each stage with equal and connective attention. This not only foregrounds the significance of audience research, but also advances the possibility of integrating textual analysis and ethnography in media studies.
**Morley’s combination of textual analysis and ethnography.** David Morley employed Hall’s model in his sequential studies of BBC week-nightly program, *Nationwide*. With Charlotte Brunsdon, they deployed textual analysis in conducting the research *Everyday Television: Nationwide*, published in 1978 (Brunsdon & Morley, 1978, in Morley & Brunsdon, 1999). Later, Morley conducted an empirical research of audience responses about *Nationwide* and published the research: *The Nationwide Audience: Structure and Decoding* (Morley, 1980, in Morley & Brunsdon, 1999). Whereas in the former research Brunsdon and Morley draw the focus to ideological themes articulated in the TV program (Morley & Brunsdon, 1999, p. 24), in the latter research Morley shifts his focus to audiences’ responses to the ideologies in relation to their social groups (Morley & Brunsdon, 1999).

In their research *Everyday Television: Nationwide*, Brunsdon and Morley closely scrutinize format, style, and materials of a selection of *Nationwide* episodes, and identify five repeating themes in *Nationwide*: *events/links, The world of home and leisure, People’s problems, The image of England,* and *National/political News* (ibid, pp. 35-61). They maintain that *Nationwide* provides “a discursive forum for the dominant ideologies of nationalism, individualism, consumerism and patriarchy, for particular and committed views of national unity based on the individual, patriarchal domination of the household, and on a commitment to home ownership and consumerism” (Nightingale, 1996, p. 65). In his other research *The Nationwide Audience: Structure and Decoding*, Morley draws his theoretical stance from Hall’s model of Encoding/Decoding and interpretive paradigm that foregrounds role of meanings of languages and symbols in the process of agent’s interaction with a concentration on audience research. In terms of the debate between European structural determinism and culturalism in the field of cultural studies, Morley argues that the question of historical subject’s
relative or total autonomy cannot be oversimplified to either a total determination or a total autonomy. Rather, “this problematic approach is concerned with some form of determination of cultural competencies, codes and decodings by the class structure, while avoiding mechanistic notions” (Morley & Brunsdon, 1999, p. 133).

Therefore, he defines his question in this research as “to explore the extent to which decodings take place within limits of the preferred (or dominant) manner in which the message has been initially encoded” (Morley & Brunsdon, 1999, p. 133). He conducted focus group interview of eighteen groups consist of various social and racial groups, and identified that different social groups have different interpretation of the program. Morley uses three different ways of reading appropriated from Hall’s encoding/decoding model: dominant, negotiated, and oppositional reading (ibid, p. 259). His findings confirm that social position by no means directly correlates to decoding. Nor can different groups’ decodings be presented in a liner continual model. He maintains, “it is always a question of how social position plus particular discourse produces specific kinds of readings or decodings; readings which are structured because the structure of access to different discourses is determined by social position” (Morley, 1999, p. 257).

Clearly Morley’s work reveals the complexity involved from encoding to decoding interwoven by threads of ideologies embedded in texts, subjects in different social positions, and their encounters, in various contexts. One might challenge Morley’s work, in particular his explanation of “why” certain groups decode texts in an unexpected way (Nightingale, 1996, p. 67). Nevertheless, in comparison with previous audience research in the field of cultural studies, Morley’s scholarship is important in at least three aspects. First, he pursues Hall’s argument about the discursively structured decoding positions of audiences, namely dominant, negotiated,
and oppositional positions. Second, he empirically verifies the position through focus group interviews. The empirical verification is significant not only at the level of testing Hall’s notion, but also at the level of triangulating researcher’s interpretation of ideology or discourse embedded in a researched program. Thirdly, he tries to integrate the perspectives of culturalist and structuralist paradigms (Nightingale, 1996, pp. 66-67). Further, in spite of some fundamental differences between media studies and my research in Taiwan’s education policy, Morley’s approach of ethnography of discourse sheds light on my research of the National Scholarship Program of Taiwan.

**Application of Ethnography of Discourse to the Research**

To understand predominant discourse(s) in Taiwan’s national scholarship program for overseas studies and how they are perceived by scholarship grantees, I appropriate Morley’s approach of ethnography of discourse by integrating critical discourse analysis and interviews with scholarship grantees. In terms of my research design and its underlying rationale there are three major differences between Morley’s model and my appropriation of it. Below I elucidate the differences as well as some potential challenges that come when one adapts an approach initially developed for a different purpose in a different research context.

While juxtaposing methodologies of critical discourse analysis and ethnography, I also argue that an integrative approach of mixing two paradigms not only seeks a post-positivist sense of triangulation, but also initiates conflicting and disputative research results in the research. Holding to the belief that truth is always partial, I argue that just this kind of integrative approach provides a critical channel to identify and present the nuanced, oftentimes paradoxical, and dense complexity between truth, discourse, subjectivity, power, and structure.
**Textual analysis versus critical discourse analysis.** While Morley’s primary interest lies in exploring (neo-)Marxist sense of ideologies in a TV program and audiences’ perceptions toward the ideologies in relation to their social positions, my interest is to identify a more post-structural sense of discourse (that could also include ideologies) in texts in relation to the scholarship program. While ideologies of (neo-) Marxist sense eventually imply a linear and progressive truth that can be reached by class struggles, discourse of post-structural sense foregrounds the productive dimension of discursive power. Based on my interest in the post-structural discourses, I intend to deploy Norman Fairclough’s social linguistic approach of critical discourse analysis (CDA). Before I elaborate CDA, I shall also succinctly explain the notion of discourse of Michel Foucault that in fact not only provides a provocative but inspirational perspective of reading knowledge claims and their formation in social sciences, but also lay down a solid philosophical foundation of discourse analysis as a method.

In his work *The Archeology of Knowledge & The Discourse on Language* Foucault (1972) eloquently elaborates the establishment of the contemporary knowledge systems by thoroughly discussing several themes: language, statements as the units of discourse, formation of knowledge, and method of archeology. Foucault views knowledge as discourse and its analysis starts with an “amorphous mass of statements” (Dant, 2001, p. 129). He argues that a set of related statements may be different in form and dispersed in time, but they form a group as a discourse referring to the one and same object (Foucault, 1972, p. 32). Therefore, his concept of statements is not limited to verbal statements, but includes a material set of social practices and institutions that forms what he calls “enunciative field” (ibid, p. 100), which not only forms but also consolidates statements.
Foucault argues that discourses constantly go through various modifications as new remarks are merged or added to them. He concludes with three criteria for observing and describing statements and discourse concisely, namely criteria of formation, criteria of transformation, and criteria of correlation. While the formation criteria defines “rules of formation for all its objects, all its concepts, all its theoretical options,” the criteria of transformation or of threshold defines the set of condition and moments that enable and condition the formation, transformation, and threshold of a discourse signifying its objects, operations, concepts and theoretical options. Last but not the least, the correlation criteria “defines a set of relations of a discourse that situates it among other types of discourse and in the non-discursive context in which it functions (institutions, social relations, economic and political conjuncture)” (Foucault, 1991, pp. 54-55).

In order to observe and identify regularities and dispersion of a set of statements and their connections, Foucault suggests utilizing the methods of archeology to investigate what has been stated and why a particular statement appears rather than another (Foucault, 1972, p. 27). In other words, he attempts to describe the rules/laws operating within a discourse (ibid, p. 62). Nevertheless, Foucault, from his neutral archeological perspective, merely describes these rules rather than assuring that the rules and discourse are “making sense and will be taken seriously,” or are the “rules of formation of the anonymous truth game” (Dreyfus & Rabinow, 1982, p. 70). For Foucault, the rules/laws of discourse formation work not just in the dimension of individuals’ consciousness, but also in discourses per se. Accordingly, based on a certain uniform anonymity, discourses operate upon “all individuals who undertake to speak in this discursive field” (Foucault, 1972, p. 63) and the features of “autonomy” and “rules governed” characterize a crucial part of Foucault’s notion of discourse analysis.
Since knowledge is conceived as discourse, the archeological method for interrogating formations of knowledge does not favor any kind of truth or particular epistemologies. Divorced from the conventional understanding of positivity, Foucault treats it as the regularity of statements in a discursive formation prior to certain epistemology or scientific truth (Dant, 2001, pp. 125-126). Consequently statements are conceived as if they are true by practitioners although that might not always be the case. Eventually, the purpose of Foucault’s archeology of knowledge does not lie in amending and reconstructing the contents of discourse as knowledge, but in troubling the coherence of the knowledge formation system by revealing how its contingent features intersect with historical, social, and discursive factors (Dant, 2001, p. 127).

Although Foucault’s provocative notion of discourse is primarily concerned with knowledge/epistemological formation, it inspires a solid methodological foundation. In the field of education, the application of Foucauldian sense of archeology and genealogy as methodologies also gradually receives attention. For instance, while James Scheurich suggests using policy archeology to inquiry social construction of many social and education problems (1994), Wanda Pillow further develops it to a feminist genealogy as a methodology to analyze educational policy for pregnant teenage mothers (2003). Also, Foucault’s approach sheds light on this research, since the idea of modernization has been taken for granted in Taiwanese society and exerts a profound influence on the educational policy direction in the scholarship program for overseas study.

While Foucault renders a philosophical foundation that can be further developed as a methodology, Fairclough’s CDA provides a more practical and strategic way of conducting social research. CDA concerns with “a three-dimensional framework where the aim is to map three separate forms of analysis onto on another: analysis of language texts, analysis of discourse
practice, and analysis of discursive events as instances of socio-cultural practice” (Fairclough, 1995, p. 2). In a broad sense, his approach is impacted by structuralist semiology, neo-Marxisms, as well as post-structuralism. To account for the relationship between the three forms, Fairclough defines discourses as abstract entities that repeat and recur over time in various social sites. Ontologically they appear in the tangible form of particular texts (Fairclough, 2006, p.41).

Moreover, discourses reflect worldviews, including the “relations with structures of the material world, feelings, and beliefs”. Discourses could be “projections or imaginaries” differentiating from the real world, and underlying particular actions or projects aiming for particular directions. Different discourses inherently reflect the relations that different groups of people have to the world and to each other. The relationship between different groups represented by different discourses could be complement, competing, or even dominating. Conversely, discourses also could be part of resources from different could deploy in shaping a relationship between each other (Fairclough, 2003, p. 124). Discourses mirror the abstract level of social relationships and social practices. This perspective leads to questions such as how in the long run differences of a discourse are instantiated in or interact with particular social events (and hence texts), since discourse is not only shaped by “the agency of participants but also by social structures and social practices” (Fairclough, 2003, p. 42).

Accordingly, CDA cannot be “isolated from analysis of institutional and discoursal practices within which texts are embedded” (Fairclough, 1995, p. 7). Fairclough argues that, similar to Morley’s notion, CDA not merely pays equal attention to a sequential process of “text production, distribution and consumption” (ibid). Moreover, CDA connects a micro linguistic and textual analysis to a macro analysis of social conditions and structure. He eloquently
articulates the intimate and dynamic relationship between discourse, text, social cultural events/practices as well as social structure:

The specificity of the particular socio-cultural practice which a discursive event is a part of is realized first in how the discursive event draws upon and works upon the order of discourse, which is in turn realized in feature of texts, so that the text-sociocultural practice link is mediated by discourse practice. As this formulation implies, discourse practice ensures attentions to the historicity of discursive events by showing their continuity with the part and their involvement in making history (Fairclough, 1995, p. 11).

Fairclough’s triple-dimensional analytical framework of discourse reflects one of his primary commitments to understand the intimacy between language, ideology, and power. This commitment further reveals domination and oppression in its linguistic form, and how profound influences of power relations permeate through networks of social practices and structures (Fairclough, 2003, pp. 15-16). In this respect, Fairclough’s CDA is overwhelmingly influenced by Gramsci’s notion of hegemony, as well as Foucault’s conceptualization of Discourse. Whereas Gramsci’s hegemony foregrounds the process of earning consent to exercise power (Gramsci, 1998), Foucault’s analysis of discourse covers from statements to formation of knowledge propositions, social practices, institutions, the order of things, and their association with ubiquitous and productive power relationship (Foucault, 1972).

Fairclough’s integrative approach requires negotiation, since a structuralist sense of semiology, a neo-Marxist concern of ideology, and a post-structuralist sense of discourse analysis has its individual emphasis, analytical framework, and even conflicting epistemological perspectives toward concepts like knowledge, ideology, truth, and power. In brief, Fairclough’s stance in this regard can be described as critically instrumental. His perspective on ideology and power, on one hand, finds him agreeing with the perspective that ideology, as a particular representation and construction of the world has an instrumental power, especially in assisting
reproducing domination. In such a case, it should be investigated and criticized. On the other hand, Fairclough disagrees with a Foucauldian sense of ubiquitous and productive power because it “helps divert attention from the analysis of power asymmetries and relations of domination” (Fairclough, 1995, p. 17-19).

In conclusion, I see that Fairclough’s CDA is slightly different from Morley’s textual analysis in his integrative and refined approach. While Morley’s textual analysis heavily relies upon a textual analytical tradition that investigates ideology behind textual language and signs, Fairclough’s approach combines the insights of semiology and discourse analysis drawing sources from both Neo-Marxisms and post-structuralism. These approaches provide a useful set of analytical tools to scrutinize various types of texts from verbal texts to discursive practice and institutions. Moreover, although Fairclough takes a dialectical perspective between structure and action, the weight of his analytical emphasis is actually on the determination of action by structures, social reproduction, and the ideological positioning of subjects (Fairclough, 1995, p. 24). His position on human agency, in spite of a different emphasis, is similar to Morley’s reconcilable stance between culturalism and European structuralism, in his approach of ethnography of discourse.

**Issues and Merits of Mixing Methodologies**

One inevitable but less explicitly discussed question about mixing ethnography and critical discourse analysis is the epistemological debate about the fundamental different views of knowledge between the conventional ethnography and critical discourse analysis. This paradigmatic issue is also inherent in Morley’s approach of ethnography of discourse. In comparison with Morley’s implicit stance is in the paradigm of cultural studies that generally
concerns with the relationship between structure and agent, I seek to contribute to the discussion of the mixture of methods as well as juxtaposition of different paradigms.

Considering Morley’s paradigmatic stance of cultural studies, since his interest ultimately is about inherent ideologies embedded in texts/programs, and his audience research attempts to investigate ideology in relation to class categories, one could say that his notion is mainly about “theoretical problems of discourse” (Nightingale, 1996, p. 67). Moreover, his strategic orientation of mixing textual analysis and focus group interview features his principal interests in exploring the relationship between ideologies in texts and audiences’ consumption of in relation to their social status/class. This observation of Morley’s paradigmatic stance opens up an entirely different but remarkable debate about the purpose, practice, and contribution of mixing methods and mixing methodologies.

The ongoing debates and controversies between paradigms and methodologies constitute a disputative terrain. Concerning the main purpose of this chapter, I wish briefly to make two notes. First, the idea of distinguishing major features and concerns of different paradigms does not imply that they are incommensurable, but to understand them as a guideline for recognizing a researcher’s actions and decisions. In this regard, featuring individual paradigms is of great help not only to reveal the major properties of each paradigm and understand why researchers design their research in a particular fashion, but also to identify how borders of paradigms are blurred and genres of paradigms are converged and re-emerge through informing each other. In brief, methodological typology shall be considered an assistance to understand the intersections and convergence of different methodologies, not monolithic orthodoxies preventing us from seeing a broader picture of a researched issue. Second, considering the issues of mixed methods and methodologies in a research I agree with Flick (Flick, 2002, p. 227; quoted in Denzin & Lincoln,
2008, p. 5) that the integration of various methodological practices, empirical data sets, and perspectives in a research is best understood as a strategy that could contribute to “rigidity, breadth, complexity, richness, and depth of the field”. The concept of triangulation should be considered neither as a means nor as a strategy of validation, but as an alternative to validation. Flick’s perception of triangulation as an alternative to validation compels one to consider Richardson’s post-structural proposal of “crystal” validity and triangulation (Richardson, 2008, pp. 478-479).

Based on these, I suggest mixing critical discourse analysis (which draw resources from post-structuralism) and a constructivist sense of ethnography in the research. This mixed paradigm research not only could serve to triangulate, but also critically examine data collected from ethnographic interview method. At this point, I find it useful to borrow Jennifer Greene’s theorization of mixing methods in social inquiry to understand my stance and purpose of mixing paradigms. Greene identifies six stances and five different purposes of mixing paradigms as referential frameworks of scrutinizing mixed methods researches (Greene, 2007). For stance of mixing paradigms, there could be a purist stance, A-paradigmatic stance, substantive theory stance, complementary strengths stance, dialectic stance, and alternative paradigms stance. In terms of the purpose, there could be for the purpose of triangulation, complementarity, development, initiation, and expansion. Accepting complementary strengths stance and the dialectic stance that “paradigms are importantly different but not incommensurable and should engage in dialogue” (Greene, 2007, p. 69), I shall mix two paradigms to partially triangulate data and partially initiate different data interpretation in my research, with the primary purpose of initiation that “evokes paradox, contraction, divergence” (Greene, 2007, p. 103), I expect to
discover and embrace different and even paradoxical reading between texts producers, grantees’ various reading of the discourses, and researchers’ interpretation of the texts.

In brief, I suggest that although the claim about the end to innocence (Van Maanen, 1995) evokes ethnographers’ caution about the crises of representation, it does not diminish the great contribution made by ethnography. Through interview of ethnographic sense, I aim to represent a holistic and comprehensive narrative that could reflect the density and thickness of agents’ (including scholarship grantees and policy makers) real and multi-layered lived experiences in a structure that is producing and produced by the discourse(s) in the program. Moreover, a critical scrutiny of texts and interviewees’ narratives then allows one to triangulate and initiate different ways of perceptions. On the one hand, triangulation led by juxtaposing two paradigms not merely point to a kind of “truth” on which various perceptions of different stakeholders (including researcher) converge, but also allows one to see textual trajectories in interviewees’ subjectivity inscribed by discursive power. On the other hand, the critical scrutiny also could challenge many understandings and meanings that have been taken for granted. Eventually I wish to unpack complex and oftentimes paradoxical encounter of structure, discourse, and human agency.

**Research Design and Data Sources**

Data were analyzed from four sources in what Greene terms “blending” in a mixed methods design (Greene, 2007, pp. 126-127). By blending, firstly I mean to gather different types of documents and conduct interview concurrently and separately. Secondly, data analysis, including discourse oriented textual analysis as well as ethnographic sense of coding and searching for themes are also undertaken concomitantly. The data sources and analyzing procedures are discussed in detail below.
About 300 volumes of the Public Bulletins issued by the Ministry of Education (between 1975 and 2000), and other Public Bulletins issued by other government departments such as the Legislative and Executive Yuans between 1955 and 2000, formed the first essential set of data sources. Focuses were drawn on the reports, numbers, regulations, and plans surrounding the concept of study abroad and the scholarship program in these bulletins. Moreover, the textual oriented discourse analysis of the content within these selected state documents focused on the rationale and the arguments underlying the purpose, as well as measures or programs used to achieve the stated objectives of the scholarship program. The examination of the utterances and practices for overseas study was not limited to their intent; rather, as distinct from standard document analysis, close attentions were further paid to how the utterances and practices were driven, mobilized, connected with each other and by external structural powers, other historical incidents, and their constructions as a coherent system. In other words, recognizing the various forms of power, such as political, economic, and discursive ones embedded in the structure that assisted the establishment of this system of statements was as important as the statements themselves. The emphasis on analyzing various kinds of power and on how they worked to mobilize and connect different statements served as a further manifestation of the significance of the second and third sets of data sources.

The second data source included other informal documentary evidence related to this program between 1955 and 2000, primarily incorporated around 220 pieces of newspaper reports on the scholarship program from three major newspapers (such as Central Daily News, United Daily, and China Times), several (semi-)autobiographies of scholarship fellows (e.g. Rong, 1909; Chou, 1984; Li, 1997; Hwang, 2009; Academia SINICA, 2011), and documentary films. On the technical level, attention was primarily drawn to reports on discussions, debates, and
initiations and rationales of changes in the scholarship within the reviewed newspaper reports. These particular attention inevitably was driven by the present research interests in discourse. Such informal sources provide an indication of the program’s significance from various perspectives. First, they offered a complementary illustration of the general socio-political context/structures in which the discourses emerge. This illustration of contexts/structures enabled the triangulation of interviewees’ narratives and the textual oriented discourse analysis of government documents. Furthermore, they facilitated clarification of the linkages between individual experiences, discourses, and the broader international socio-political contexts. Second, a review of these informal documentary evidences, which represent different kinds of genres, assists in tracing the dissemination of discourses and their interactions and dialogues. Genres, government papers, scholarly works, interview narratives, newspaper reports, and autobiographies, can be seen as “ways of acting discoursely” by various agents (Fairclough, 2003, pp. 26-31). Agents act or speak through these various genres. The analysis across genre-chains reveals how particular discourses travel “from genre to genre” and “transcend space and time” and eventually become regarded as universal common sense (Ibid, p. 31).

Third, studies carried out on the program and the related policies that governed overseas studies at that time. Examining these works advances the understanding of how government policy statements are supported or opposed and in what manner within seemingly value-free and neutral academic works. Research “statements”, whether for or against the program reveal not only how knowledge claims, as a type of discursive power, are used to underpin policy measures or programs, but also how they often are driven by the exigencies of broader political struggles and economic conditions. This is not to say that the discourse is entirely conditioned by political and economic structures, but does suggest the need to be attentive to the dynamic interplay
between political and economic structures. This research examines the human factor within an international, political and economic scenario, that surround the scholarship program, as well as its scholarship recipients, policy makers and executives. The focus of this analysis extends beyond the examination of simple mechanical and causal relationships, to portray the constant interactive tensions between political, economic and human factors.

Last but not the least is interview narrative. In analyzing government documents and other studies, interview questions were developed to collect the narratives of scholarship grantees, policy makers, and program executives during the 1990 to 2000 period. The research questions are imbedded in a semi-structured 40-minute interview and seek to understand scholarship grantees’ experiences before, during, and after their study abroad; in addition to their personal motivations or rationales for seeking overseas study. In the second part of the interview, questions on program discourse based on the extant research literature will be presented by asking them to read and respond to excerpts of program materials or newspaper reports articulating the aims of the program. (See Appendix A for the interview questions for scholarship recipients). For the policy makers and executives, an interview of about forty minutes sought to obtain an understanding of their perceptions of the program and their experiences in conducting the program in relation to the expectations for the program, and the challenges involved for them and the program (See Appendix B for the interview questions).

In terms of selection of interviewed subjects, from December 11, 2010 until Jan 19, 2011 I identified ten grantees either from grantees lists publicized in the MOE Public Bulletins or snowball sampling. Sequentially, I submitted invitations to six scholarship fellows, three current government officials and one retired government official in charged of the program. Three scholarship fellows (Dr. B, Dr. D, and Dr. E) and three officials agreed to participate in
interview, although in the end only two officials completed whole interview questions. Considering limited resources and enrichment of diverse narrative perspectives, I therefore brought in two sets of interview data conducted in July 2009 for a pilot study of this research (Dr A) and in July 2010 (Dr C) for the preliminary stage of the dissertation. Both of the interviewed fellows granted consents and the interview data with them were only partially or entirely not analyzed. The importance of Dr A’s narrative lied in that he was the only accessible fellow among the very few going to overseas study in the 1960s, while Dr C was the only female fellow approachable. Additionally, both Dr A and Dr C were invited through close networking and did in-person interviews, their responses to the questions were more open, free, and direct. Interviews with them were more like free chat and thus covered a wide range of dimensions, although only a small portion of the narratives were presented.

All together, five scholarship grantees that went to study abroad with the program in the mid-60’s, early 1970’s, early 1980’s, late 1980’s, and late 1990’s were interviewed. All of them, graduates from elites universities in Taiwan, have doctoral degrees in social sciences and held either faculty appointments at universities or position in government. During the time of interview one of them taught overseas, while the rest were in Taiwan. One of them was female while the rest were males. Whereas four of them studied in the United States, only one of them studied in a European country. Below is a table compiling basic information of the five scholarship grantees.

Table 1

*Basic Information of the Five Interviewed Scholarship Fellows*

<table>
<thead>
<tr>
<th>Gender</th>
<th>Dr. A</th>
<th>Dr. B</th>
<th>Dr. C</th>
<th>Dr. D</th>
<th>Dr. E</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time of study abroad</td>
<td>Mid 60s</td>
<td>Early 70s</td>
<td>Early 80s</td>
<td>Late 80s</td>
<td>Late 90s</td>
</tr>
</tbody>
</table>
Table 1 (continued)

<table>
<thead>
<tr>
<th>Country</th>
<th>Europe</th>
<th>USA</th>
<th>USA</th>
<th>USA</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field</td>
<td>Education</td>
<td>Education</td>
<td>Media</td>
<td>Education</td>
<td>Finance</td>
</tr>
<tr>
<td>Current position</td>
<td>Professor Emeritus at a leading University in Taiwan and a chairman of a government trustee</td>
<td>Professor emeritus at a leading University in Taiwan and a current member policy consultant</td>
<td>Retired from a leading University and currently a faculty member at a private University</td>
<td>Faculty member at an elite University in Taiwan</td>
<td>Faculty members at a East coast American University</td>
</tr>
</tbody>
</table>

In addition to the five fellows, three interviewees involved in policy forming and program conduction were identified. While the former, Dr. G, worked in different positions at decision-making level in the Ministry of Education since the late 1980s until 2000, the latter, Ms. X, primarily was in charge of the program around between 1999 and 2000.

Following conventional interpretive methods the interview data were coded to identify emergent themes in their narratives. Moreover, research attention is also paid to uncommon themes emerged among them. These common and uncommon themes portray common and uncommon experiences in relation to the scholarship program across generations, and how recipients generally made sense of it within the broader social, economic, and political contexts. Additionally, they provide a map to triangulate whether and in what form the discourses investigated could circulate among individuals and shape their perceptions of the program. In this study, the ethnographic interview provides the basis for investigating various discourses on the program. In addition, the analysis is advanced by treating these themes as texts and situating them in various social conditions and structures. As indicated by Fairclough (2003), “textual analysis is best framed within ethnography. To assess the… ideological effects of texts, one would need to… link the ‘micro’ analysis of texts to the ‘macro’ analysis of how power relations
work across networks of practices and structures” (p.16). In this sense, the textual oriented discourse analysis is neither isolated from ethnographic works nor replaced by the ethnographic interview; rather, they complement each other, present various perspectives, and provoke dialogue.

In brief, this study concurrently conducts textual oriented discourse analysis of different documents and ethnographic interviews with the hope to better map out and trace various discourses surrounding the program in relation to the concept of studying abroad, modernization, and national/social development.

In particular for interviewees’ experiences, since the primary research goal is more than the organization of a researcher’s foreshadowed assertions, it must honor the experiences and discourses of program stakeholders, including recipients and policy makers/executives…To this end, the priority for interview questions is to invite interviewees to freely recall and illustrate their memories, experiences, and feelings in the social contexts related to their overseas study. Subsequently, questions about the preliminary identification of discourses, such as modernization as well as national and social development, aimed at inviting them to critically reflect on their experiences in relation to the structure and their roles in the structure. Careful consideration will be given to both for the purpose of fully illustrating different possible discourses.

This ethnography study of discourse features a type of analytical strategy with a strong emphasis on discourses, language, and power. It is driven by a deconstructive approach that does not aim to advocate or prioritize ideologies or values, but examines how they are constructed and disposed in a particular way by the underlying dynamics of power. The approach of this research ostensibly deviates from a conventional approach of educational policy analysis and program
evaluation that always embodies or advocates an interest or value. And it would be disingenuous not to declare an underlying intent of this study to discover findings that will be useful for program improvement. In this research, I hope to use a deconstructive kind of criticism with the emphasis on various powers embedded in language that eventually could engender more diverse possibilities of scrutinizing the program and eventually make some change. In other words, in the present stage being critical is even though initial, but crucial.
Chapter 4

Discourse of Modernization in China and in Taiwan

Introduction

As chapter 2 demonstrated, much research has been generated on the critical role of Taiwan’s national scholarship program for overseas study in the modernization of China and Taiwan (Lin, 1976; Research Committee for National Development, 1975; Wang, 1980; Wang, 1992a; Wang, 1992b; Dai, 2005). One common view is that the program of sending students abroad and their influence through occupying critical positions upon their return to Taiwan led to the gradual development of the educational and other social domains. Alternatively, from the policy level, the scholarship program is a reflection of how various discourses contested for the national landscape and were embedded into the fabric of the scholarship program. By referring back to the inception and the institutionalization of the scholarship program in the late nineteenth century, this chapter discusses the ways in which the two dimensions of the scholarship program influenced and were, in turn, affected by the other: different discourses shaping the scholarship program and, the program, as a product of a dominant discourse that was intertwined with new emerging discourses exerting “modern” influences on Chinese and Taiwanese societies.

Overall, discursive shifts of the scholarship program could be primarily distinguished as to two broad stages: The first one was the period during the Mainland China and the second one was since its resumption in Taiwan in 1955. Moreover, I further identified two in the former period and four after its resumption in Taiwan. In this chapter I will focus on the first two stages: Inception Stage (ca. 1872 to 1881) and Institutionalization Stage (ca. 1909 to 1943), and further the discussion of the later four stages in Taiwan (ca. 1955 to 2000) in Chapter Five. At first glance, one might question the relevance of addressing the first two stages in understanding the
meaning of the program to Taiwan. My rationales are threefold. Firstly, an extensive number of scholarly papers recognized the Rong Hong Project in the Inception Stage and Boxer Indemnity Scholarship Program in the Institutionalization Stage as critical predecessors of Taiwan’s policies for overseas education in relation to the modernization of Chinese and Taiwanese societies (Research Committee for National Development, 1975; Lin, 1976; Wang, 1992a).

Partially, in line with these studies, I agree on the crucial roles of the events occurring in the first two stages. Nevertheless, my stance differs from most of these studies that inherently assume that events in the first two stages followed linear, coherent, and consecutive development trajectories. I argue that the assumption is based on a ready acceptance of the need for China and later Taiwan to achieve a progressive type of modernization. By saying so, I do not mean to devalue the progressive type of Modernization. Instead, I suggest viewing these events as a terrain in which various discursive powers (one of them being the European tradition of Modernization) converge, contest, and finally become one monolithic discourse that drove and shaped the direction of the scholarship program. Therefore, by distinguishing the stages into inception and institutionalization I do not imply a progressive, linear, and consistent type of development of the scholarship program in understanding modernization in relation to education. Rather, my focus is on how the Enlightenment, Modernization, and “national and social development” discourses disseminate, permeate, and earn the policy terrain via discursive or other kinds of power.

This standpoint links to my second rationale. Namely, that the portraits of the three stages and their contrast to each other provide a contextual understanding of how discourses in the scholarship program could not only shift dynamically in response to a changing social structure/condition, but could also be created and utilized to change and sustain the condition.
Through a triple-dimensional analysis: social condition/structure, competing discourses influencing the program and education, and scholarship grantees as agents, one sees how critical factors, such as political power as manifested in imperialism and colonialism, commercial interests, as well as racial/cultural discourses, shaped the scholarship program as a means of modernization. Briefly, the scholarship program as a type of text mirrors how it is carved out by discourses and becomes a means to reproduce them and inscribe them on scholarship grantees, although the grantees themselves might not necessarily receive the discourses in a direct fashion.

Thirdly, the portraits of the three stages provide a historical background that explains the complex relationship between Taiwan, China, and the United States after World War Two. Discourse in the scholarship program at the Resumption Stage reflected the intertwined cultural discourse of nationalism, national sustainable development, and ideologies that veil material struggles – the geopolitical concerns in the East Asia region and the economic interests of the three parties.

Following the portrait of the two phases of the idea of study abroad in its early stage, as an introductory context, I also very briefly illustrate the discursive development of “modernization” in Taiwan during the Japanese colonization. This concise portray helps understand the discursive complexity entangled with Chinese nationalism, its hatred of Japanese colonization in Taiwan and therefore its complex affection about conceiving Taiwan of Japanese-colonized-Chinese, the traitor. This complex affection might not directly be found in the scholarship program, however a brief discussion of this complexity provides not only an understanding of how discursive dissemination of “Modernization” was achieved through colonialism, but also an implicit background explaining why the scholarship program never actively encouraged overseas studies in Japan until very late. More important, the juxtaposed
tracks of Modernization for China and Modernization for Taiwan allow one to see how different historical contingencies produced different trajectories, even though these trajectories were in the same name of Modernization. These diverse and dynamic discourses of Modernization were entangled with nationalism and imperialism/colonialism, which further shaped individual historical experiences of subjects in China and in Taiwan, and eventually complicated discourses about modernization in relation to national and social development of the scholarship program after it was resumed in Taiwan.

**Discursive Inception and Institution of Modernization, National and Social Development**

**Inception.** A research on the modernization of Chinese education will be incomplete without reference to the dispatch of the first 120 Chinese mission students by the Tsing Dynasty to the United States\(^{10}\) in the late 19th century – referred to as the Rong Hong Project. Discussions of this project are well documented in various academic papers on the Chinese government’s initiatives on overseas study, the education exchanges between China and the US (La Fargue, 1987; The Chinese Students Memorial Society, 2009), as well as government reports (MOE, 2008b).

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\(^{10}\) This chapter briefly illustrates the program of sending the first group of 120 students to the United States, Rong Hong’s commitment in securing Western education for the Chinese, and the self-strengthening movement. A more detailed account of these students’ and Rong Hong’s lives, and the political as well as socio-cultural milieu are documented in the works of La Fargue (1987). The Chinese Students Memorial Society (2010a), Chinese Educational Mission Connections (2010), as well as in a documentary by China Central TV (2010).
The late 19th century until the Second World War witnessed numerous wars and imperial inroads into China. Following defeats in the Opium Wars (1839-1842 and 1856-1860) to powerful British and French gunboats that forced China to open her borders to the opium trade (O’Brien & Williams, 2007), the Tsing Dynasty was further overpowered in a series of wars with other Western imperialist nations. In addition to the contacts with western traders and Christian missionary activities, these humiliating events spurred the Chinese elites to advocate the acquisition and appropriation of western technology, especially in the military sphere. To strengthen China’s ability to withstand Western imperialism and to uphold national honor, a group of Chinese political and cultural elites, such as Tseng Kuo-fan\(^\text{11}\) and Li Hong-zhang\(^\text{12}\), urged the Tsing government to undertake a series of reform measures under the *Self-strengthening Movement*. The measures primarily included westernizing the military, industrialization, establishing schools for teaching foreign languages and training interpreters, and from 1872, sending mission students to Hartford, Connecticut in the US to learn modern science and engineering. In all, 120 boys were sent in four batches from 1872 to 1881 for this purpose\(^\text{13}\) (Hsü, 1999, pp. 282-283).

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\(^{11}\) Tseng kuo-fan (1811-1872) was a leading official in the late Tsing Dynasty who advocated reform measures to confront Western intrusions into China.

\(^{12}\) Li Hong-zhang (1823 - 1901) was a leading official and primary statesman in the late Tsing Dynasty. Li’s political approach inclined towards openness in dealings with Western countries. He was also the primary diplomatic spokesman in negotiations with foreign powers.

\(^{13}\) In addition to Rong Hong’s education background in the United States, the other reason that drove the Tsing government sent these students to the United States than other European countries was that in 1868 the States and China signed a treaty on a reciprocal basis, which
This group of students was organized by Rong Hong (or Wing Yung, 1828-1912) who is listed as the first Chinese graduate from an American Ivy League school, receiving a Bachelor of Art degree in 1854 and an honorary Doctoral Degree of Law in 1876 from Yale (Yale University, 2009). Upon graduation he returned to China to fulfill his ideal of helping his people to get Western education, which he perceived as immensely benefitting China. In his autobiography, *My Life in China and America* (1909), he articulated the benefits for the Chinese to pursue the kind of education he received in the US, since it could help them “become enlightened and powerful” (Rong, 1909, p. 57).

The mission of getting American education for these elite Chinese students was not as uncomplicated as Rong and the Tsing government had expected. For instance, some of the students applying to the military academy at West Point were rejected in spite of their excellent academic performance. This experience, in addition to several other factors, such as the different value systems of Confucianism and Liberalism, the Tsing government’s suspicions at supported citizens of the two parties mutual rights of residence and attendance at the public schools. La Fargue argued that it was this American benevolent gesture attracting the Tsing government to send students to the United States (La Fargue, 1987, pp. 32-33). Nevertheless, as it was shown soon, these Chinese students’ being rejected by the Military Academy at West Point. The rejection actually could provide a different interpretation for reading the treat.

14 Rong noted in his autobiography, “…till some of the students were advanced enough in their studies for me to make an application to the State Department for admittance to the military academy at West Point and the naval academy in Annapolis. The answer to my application was: ‘There is no room provided for Chinese students.’ It was curt and disdainful” (1909, p. 207).
the Christian baptism of some students as well as anti-Chinese sentiments prevalent in the US at that time\textsuperscript{15} \cite{Chinese Students Memorial Society, 2010b} offended the Tsing government which recalled these students except for those few already enrolled at colleges and universities. Initially targeted for fifteen years the Rong Hong Project was eventually reduced to nine years.

Although Chinese society at that time was generally wary of these American-educated students, many returned to China and embarked on “modernization projects” \cite{Chinese Students Memorial Society, 2010a}. Some of them became influential figures in the newly constituted republican Chinese government. A study indicated that 75 of the 120 students occupied government positions. One student became prime minister, another the Minister of Foreign Affairs, two were appointed ambassadors to the United States, eleven were diplomats, two became university presidents, in addition to the many others who occupied important positions in the government’s railroad\textsuperscript{16}, armament, and defense departments as well as in manufacturing industries \cite{La Fargue, 1987; Chinese Students Memorial Society, 2010b}. In

\begin{quote}
\textsuperscript{15} For instance, the passing of the Chinese Exclusion Act in 1882 by Congress following the influx of Chinese migrant labor in the California gold rush and for building the transcontinental railroad.
\end{quote}

\begin{quote}
\textsuperscript{16} One of the most famous officials was Jeme Tien-yow, named the Father of the Chinese railroad system. Jeme majored in civil engineering at Sheffield Scientific School of Yale, and led the construction of several important railroads in China \cite{Chinese Educational Mission Connections, 2010}. Prior to that, the profitable railroad industry in China was monopolized by Western companies often causing conflicts of interest between China and these companies’ countries.
\end{quote}
brief, most of these mission students occupied key positions in both the later part of the Tsing government and throughout the transition to the republican Chinese government.

In the inception stage, the Rong Hong Project served as a critical experimental component of the Self-strengthening Movement through which the Tsing government hoped to understand, introduce, and industrialize the country’s systems. Nevertheless, a core question raised by the Rong Hong Project as well as the Self-strengthening Movement projects is the basis for and extent to which China should undertake Westernization projects (Chou, 1984, p. 21). The political and social elites involved in the program clearly had their respective answers. To Tseng Kuo-fan and Li Hong-zhang, Western education only signified a channel of understanding and imitating their advantages to control the West, whereas for Rong Hong Western education was a means to “enlighten” the Chinese and further “regenerate” China (Rong, 1909).

It might be easier to appreciate the basis for these different perspectives by looking at these individuals’ different educational backgrounds. Tseng and Li were educated in the Confucian system and became government officials through the conventional imperial examination process. They earned their political influences through their contributions in either suppressing domestic rebellions or in wars against foreign invasions. These experiences largely differentiated their attitudes toward the West from that of Rong Hong. Before going to the US, Rong’s parents, with an eye on the potential commercial benefits of dealing with Western businessmen sent him to a missionary school. With the support of the American missionary principal, he pursued higher education at Yale (Rong, 1909). To many the elite education at Yale at that time was undoubtedly not only racially exclusive, but also racialized and it is understandable why Rong considered education at Yale, which then was primarily for the whites, as “enlightening and powerful.” This elite American education shaped Rong’s perceptions
towards the Chinese and rationalized his intentions in providing American education to the Chinese. This racialized attitude was repeated in Rong’s documents and writings. For instance, one of his correspondences with an American missionary friend in China noted that, “most of the Chinese are tendentious… They are not like you or others who could observe with an enlightened and liberal attitude. They refuse the benefits of education and are always ignorant and superstitious” (Rong, 1849 quoted in The Chinese Students Memorial Society, 2010b).

I would argue that the different perspectives of the Chinese political and social elites like Tseng, Li, and Rong, to some degree, also represent contesting discourses, such as Western Enlightening education for the social elites and Chinese civil education primarily aimed at cultivating scholars and government officials. Eventually, the dominant discourse reflected a compromise but which was still rooted in the Chinese type of education, since the underlying philosophy of the Self-strengthening Movement was to “learn the superior techniques of the barbarians to control the barbarians”17 (Hsü, 1999). This dictum reflected the complex attitude of the Chinese political and social elites towards the confrontation between China and the Western countries. Although regarding the Westerners as “barbarians,” the general experience of trading with foreigners, Christian missionary work in China, as well as losing the series of wars, forced the Chinese elites to recognize the superior techniques of the West, and creating a desire to acquire them for “controlling the barbarians.” This predominant discourse favoring the Chinese system in the program inevitably influenced the Tsing government’s decision in recalling the students home.

17 This dictum was proposed by a Chinese scholar, Wei Yuan (1794-1856), one of the several scholars in his time who not only initiated introducing Western material development and technologies, but also advocated adopting these technologies.
From the American perspective, the departing students represented a failed effort in acquiring Western systems, and a rejection of the political values and Christian ethics developed in the enlightened and civilized West. The article *China in the United States* in the New York Times of July 23, 1881, to a large extent was a reflection of this attitude:

> It is unreasonable to suppose that bright young men like those educated in the United States at the cost of the Chinese government should content themselves with absorbing the principles of engineering, mathematics, and other sciences, remaining, meanwhile, wholly irresponsible to the political and social influences by which they are surrounded. They need not become republicans and anti-monarchists; but the liberal ideas which they insensibly absorb are as much out of place in China as savagery would be in the most highly civilized and enlightened capital of Europe…

Clearly, both the Chinese and American mainstream societies considered their opposites as “the other” in different ways. For China, the issue of learning Western natural sciences and technologies remained as the means to stop and control Western imperial incursions into China; for the American Liberalism and Christian ethics were the core that needed to be learned to become civilized and enlightened.

For this group of young students, their experiences and exposure were entirely different from that of Li, Tseng, or Rong. Some ethnographic and documentary works indicate the difficulties faced by them in practicing both the Chinese and American ways of life, even though they eventually figured out ways of merging the two in their daily lives (La Fargue, 1987). This reconciling, I would argue, reflected a hybridity that shaped these semi-colonial subjects. For instance, most of the students kept their Manchurian queue hairstyles symbolizing their loyalty to the Ching Dynasty, even though it meant discrimination and problems in daily activities such as during physical education classes (Bieler, 2004, pp. 6-7). Likewise, they learned to argue and elaborate their thoughts at school, but overall were required to be subservient to their Chinese teachers’ instructions. It can hardly be argued that this hybrid life style entirely transformed their
identities; nevertheless the fact that some students considered converting to Christianity largely implied a shift toward different values system. Additionally, this reconciled hybrid lifestyle and learning did not prevent them from being recalled to China. Not to mention that their role in China was actually paradoxical. Some historians point out that these students were treated with scorn and suspicion by the Chinese gentry at that time (Bieler, 2004; Ye, 2001) finding these American-educated students too liberal18 (The Chinese Students Memorial Society, 2010a).

In the Inception Stage, the primary discourse on the scholarship program was less about “modernization” than about importing Western military technologies and industries. The Rong Hong Project reflected a reconciliation of the contesting discourses in choosing between either Chinese civilization or Western Enlightenment. Obviously, nationalism and ethnocentrism also came into play. While the Chinese elites saw their “other”, the Westerners, as “barbarians,” American society considered China an ancient empire that needed infusions of Western education for enlightenment and liberalism. Moreover, despite the hybrid lifestyles of the mission students, the situation was somewhat paradoxical as they were the subject of suspicion by their contemporary Chinese and at the same time considered uncivilized by the Americans. This phenomena and the tension between different discourses became even more pronounced in the next stage even as the influence of this first group of students was an added dimension to the successful institutionalization of the scholarship program for overseas study.

**Institutionalization stage: Boxer Indemnity Scholarship Program (1909 - 1943).** The institutionalization stage refers to the phase when elite Chinese students were sent to the United

18 After the republican revolution of 1911, the political stance of these students was, however, considered too conservative for the Kuomintang or the Chinese Nationalist Party (The Chinese Students Memorial Society, 2010b).
States on a regular basis under Boxer Indemnity Scholarship Program. The modernization of China through this system was embodied not only through the discourse of Western modernization and the need for China to reform, but also through a set of socio-cultural events and organizations, such as annual central exams to recruit qualified scholarship recipients and the establishment of schools preparing the students for the US. The institutionalization of the scholarship program per se, I would argue, was a process contested among various elements that included the political tussles between China and the US, economic considerations, as well as to combat cultural arguments about Chinese civilization and Western enlightenment. Eventually, an imperial and ethnocentric discourse based on Western enlightenment and progress came into play as a catalyst in bringing about the scholarship program. The program, in addition to other similar matching measures, was a kind of socio-cultural practice further perpetuating the discourse.

Overall, the institutionalization of the scholarship program not only opened the door to systematically send elite students overseas; in the context of modernization, the program also discursively stimulated a trend for overseas studies. For instance many provincial Chinese governments also started their individual overseas-study programs while the number of students abroad on self- or Western-missionary-funds also increased. Moreover, women started studying abroad either through the program or using their own financial resources. One of the most prominent groups of women representing this trend were the three Soong sisters, who through their missionary family’s support studied in Wellesley College and two of whom became wives of Sun Yat-sen^{19} and Chiang Kai-shek (Lin, 1976). These women’s roles were extremely critical.

^{19} Sun Yat-sen (1866-1925), named the Father of Modern China attended Christian missionary school in China. In 1879 he moved to Hawaii and attended missionary school for
in bridging the gap between republican China and the US as well as other Western countries (Crozier, 1976; Taylor, 2009). The basis for the institutionalization of the indemnity scholarship program is illustrated below.

Around that time the socio-cultural setting in China was confronted with unprecedented transformation. The defeats suffered in wars with European countries led the Europeans to establish concessions in many Chinese provinces, which in addition to expanding the activities of Christian missionaries and Western businessmen caused extensive transformation to the Chinese socio-cultural landscape. In particular, while the number of Chinese who received Christian missionary education increased dramatically, there was also an accompanying upsurge in translations of the so-called Western natural and social scientific canons (Hsü, 1999). Books such as Thomas H. Huxley’s *Evolution and Ethics* (1893) and Adam Smith’s *The Wealth of Nations* (1964), among many others, were translated into Chinese and exerted a profound influence on political, social, and economic thinking in China.

Whereas the Chinese elites’ attitudes towards Western knowledge was forced to be more receptive, there was also another group of social elites, primarily those receiving Christian missionary education, that started advocating revolution to replace the Tsing government with a republican China. Within the Tsing government, a strong pro Chinese-culture approach was advanced and developed to the point of making *Chinese philosophy* a fundamental principle higher education and was soon naturalized as an American citizen. In 1887 he enrolled at the Hong Kong College of Medicine for Chinese, also affiliated with missionary society, to study medicine. Upon his graduation, he practiced as a medical doctor for a while before officially engaging with political revolutionary activities.
while taking *Western learning as a practical application*\(^{20}\). For Western-educated Chinese social elites, such as Sun Yat-sen, a republican China based on anti-imperial nationalism was the only way to defeat Western imperialism and colonialism. Like many of his contemporaries receiving Western education, Sun was deeply influenced by the prevalent discourse of Social Darwinism, which was apparently complicit in and also rationalized imperialism and colonialism. This influence led Sun to be a fundamental nationalist establishing the Chinese Nationalist Party (Kuomintang) agitating to overturn the Tsing Dynasty and replace it with new republican China. In his lectures on *The Three Principles of the People* (Sun, 2004) he acknowledged European material civilization and advancement while denouncing European imperialism and colonialism around the world at the same time. Sun argued that despite Western material advancement, Chinese philosophy was still superior. By adopting Western material civilization while preserving Chinese philosophy, the Chinese nation would be revitalized. The revolution led by Sun for building a republican China eventually succeeded in 1911 after his very first attempt in 1895\(^{21}\).

Before the revolution succeeded, imperial concession conflicts between Chinese citizens and European settlers and missionaries increased dramatically. Eventually, in 1900, the anti-Christian/anti-colonial Boxer Rebellion broke out. The rebellion resulted in an indemnity of US$20 This philosophy was enunciated in 1898 by Zhang Zhi-dong (1837-1909) a leading official in the later part of the Tsing government and who strongly supported reform measures to defend the Chinese nation.

\(^{21}\) The other critical event in 1895 was that Taiwan was ceded to Japan and started a different path of “modernization”, which is detailed in the following section on modernization in Taiwan during Japan’s colonization.
6.653 billion being imposed on the Tsing Dynasty by eight countries: Austria-Hungary, the French Third Republic, the German Empire, Italy, Japan, Russia, UK and the US (Hsü, 1999). The reasons leading to part of the US-claimed indemnity being used for a scholarship program for recruiting Chinese elites to study in the US remain controversial, since historians have different interpretations and explanations for how the idea originated. This controversy, I would argue, is not only a reflection of the complexity of the political struggle, economic issues, and the cultural discursive struggles between the Tsing Dynasty and the US, but also reveals how history is often narrated and rationalized in a grand, coherent, and discursive way that masks such considerations.

While there is much research pointing to the indemnity scholarship program as the idea of the Ching Dynasty as a way of expressing gratitude for American generosity in returning part of the indemnity (Lin, 1976; Bieler, 2004), other studies stress on the individual influences of the American missionary, Arthur Smith, (Research Committee for National Development, 1975; Wang, 1980) and the Chinese ambassador, Liang Cheng in initiating the program (Wang, 1992a, p. 329). Nevertheless, Hunt provides the most persuasive account of the institutionalization of the scholarship program from both American and Chinese historical documents (Hunt, 1972). Although somewhat lengthy this detailed history renders one of the best examples of how political and economic interests often mobilize the discourse, while the latter itself provide a most powerful drive that catalyzes and sustains a scholarship program based on political and commercial considerations.

From diplomatic exchanges between China and the US, Hunt (ibid) was able to point out that to strengthen her bargaining position the US, like the other seven countries, claimed an indemnity double the actual cost of the damages caused by the Boxer Rebellion. The US
immediately realized that the claimed amount was far beyond what China could ever possibly pay off. Due to various factors, such as anti-Chinese sentiments in American society, China’s boycott of American products to protest the mistreatment of Chinese in the US, and American companies’ losing railroad building contracts in China, the US government was reluctant to take immediate action to return the excess amount. The Chinese ambassador, Liang Cheng, who was once a student in the Rong Hong Project, initiated efforts to get the American government to return the excessive funds. The negotiating process lasted at least four years since Liang’s initiative in 1905 until China was compelled to accept American conditions for returning the surplus funds. The terms required the Tsing government to propose a concrete plan for sending students to the US although the Chinese Tsing government would have preferred to use the funds to develop the country’s infrastructure and industry, such as building railroads and the banking industry.

In the same research, Hunt further explained that the idea of utilizing the surplus indemnity for educating Chinese was initially not accepted by the US Congress and President Roosevelt. Nevertheless, after relentless advocacy by William W. Rockhill the US Commissioner to China, an American missionary Arthur H. Smith, and Illinois university president Edmund J. James, Roosevelt relented to this proposal. The common argument used by these influential persons was that American education for the Chinese elite served the many mutual interests of the US and China. Rockhill believed that education “on modern lines” is fundamental for China to “survive as an independent state,” while for the US the American-educated Chinese promised a better partnership with political stability and economic progressivity (quoted in Hunt, 1972, p. 549). Smith’s advocacy was based on two rationales. First, from a savior’s perspective, America, as one of the most enlightened western countries,
should bear the responsibility of providing modern education to the Chinese, since the Chinese were a race with a civil history and great potential. He provided detailed descriptions of the Chinese in several of his books (in 1894, 1899, & 1901) which undoubtedly served as good examples of how as an enlightened Westerner he perceived the Chinese as “the other.” Second, considering China’s critical political and economic influence and American interests in the Far East, the US by no means should miss the opportunity to establish a relationship with China (Smith, 1907). To support his arguments, Smith quoted a critical document, *Memorandum Concerning the Sending of an Education Commission to China*, sent by the University of Illinois president, E. J. James, to President Roosevelt and other university presidents. This memorandum more clearly indicated that the benefits to America from engaging educated Chinese elites lay in the ability of these elites to have a subtle but profound impact at the intellectual and spiritual levels through their leading positions in society (James, 1906). For instance, the memorandum noted,

> The nation, which succeeds in educating the young Chinese of the present generation, will be the nation, which, for a given expenditure of effort, will reap the largest possible returns in moral, intellectual and commercial influences. If the United States succeeded thirty-five years ago as it looked at one time as if it might, in turning the current of Chinese students to this country, and has succeeded in keeping that current large, we should today be controlling the development of China in that most satisfactory and subtle of all ways—through the intellectual and spiritual domination of its leaders.

This excerpt again exemplifies a cultural discourse in education driven by political and economic concerns. The purpose of providing education to then China was not merely to Enlighten them, but also to serve particular interests of America. In other words, the discourse of Enlightenment did not run without any other politic-economic powers.

Hunt indicated that such views by the American socio-cultural elites on providing “modern education” to the Chinese in fact matched President Roosevelt’s conventional
perceptions of China. For Roosevelt, China was an “uncivilized country” preyed on by its Western enemies due to its “weakness and lack of patriotism” (Roosevelt, 1901, quoted in Hunt, 1972, p. 550). Roosevelt shortly accepted the agenda of using “education as a civilizing force among this backward race” and suggested to Congress the significance of recruiting Chinese students to study in the US as a means to assist China “adopt to modern conditions” (Hunt, 1972, p. 550). Strikingly, soon after the Boxer Indemnity Scholarship Program for studying in the US had been established, several other “creditors” of Boxer Indemnity, such as Britain and France also took similar measures of requesting sending Chinese students to study in these countries on their remained indemnity.

The arguments of these US political, religious, and academic elites not only demonstrate the power of a socially dominant class in producing and shaping particular discourse in a society, but also reaffirm that education had never been innocent and independent from political and economic interests. To a large extent, politico-economic interests and particular cultural discourses intertwine with and sustain each other. In the case of the indemnity scholarship program, it is the catalytic power of a discourse that drove and realized the institutionalization of the program. From the perspective of the American elites engagement in the education of the Chinese promised future benefits. At the same time, those seemingly neutral discourses are in fact complicit with particular political and economic interests, and provide the best rationale to legitimize, institutionalize, and further perpetuate the scholarship program, while the program itself served as a tangible and material means to perpetuate the discourse.

It was these long-term wrestles of politico-economic power underlined by cultural discourse that engendered the Boxer Indemnity Scholarship Program. The Program included an annual central exam for recruiting elite students, setting up a school in Beijing for preparing
students for studying in the US as well as a supervisory institute established in the United States. The Tsing-hua Preparatory School not only prepared students passing the central exam for study in the US but also grounded their knowledge in fundamental Chinese classics to ensure their native culture and heritage would not be lost in the process. The school’s first president, Tang Guo-an was a graduate of the Rong Hong Project in 1891. Based on the Tsing government’s proposal for the program, 100 students would be recruited annually from 1909 for higher education study in the US in the first four years. Following that the Chinese government would send fifty students annually throughout the period of the indemnity remission. In 1928, the Tsing-hua School was upgraded to the National Tsing-hua University and began enrolling undergraduate students (Lin, 1976; Tsing-hua University, 2010). The special position of the Tsing-hua School was also subject to controversy. Unlike many other contemporary higher educational institutions which were overseen by the Ministry of Education, the school came under the purview of the Department of Foreign Affairs in the Chinese Tsing government and the Ministry of Foreign Affairs in Republican China (Tsing-hua University, 2010), until 1929 when it was officially upgraded to university status.

In 1924 the balance of the indemnity was used to establish the China Foundation for the Promotion of Education and Culture. The foundation was managed by a board consisting of ten Chinese and five American representatives, which included Paul Monroe and John Dewey. The terms set out by the American Congress mandated that the funds could be only utilized for modernizing and developing education in China such as in the science field, improved library facilities, as well as for study in the US (Research Committee for National Development, 1975, p. 21; Lin, 1976; Zhang, 2006). The foundation further utilized the funds for the Tsing-hua
University to continue the program of sending students to the US from 1929 until 1943 (Lin, 1976, p. 456; Wang, 1992a, p. 346).

Since the institutionalization of the program, there was a consistent and significant increase in the number of young Chinese students sent to the US. Research indicates that from 1909 to 1929 at least 1,289 graduates of the Tsing-hua Preparatory School went to the US for further study (Wang, 1992a, p. 332-333). Since the Indemnity Scholarship Program also subsidized self-funded students, around 2,000 students in total were involved in the program during that period. In comparison to the previous stage, the fields studied were no longer limited to subjects such as civil engineering, machinery, or mining, but were generally extended to education, philosophy, finance, banking, medicine, politics, etc., (Lin, 1976). Many of the students returned to China and played influential roles in the country, while some remained overseas because of the disruptions of the Chinese civil wars between the communist and nationalist parties, as well as the First and Second World Wars (Cheng, 2003, p. 5). Many early grantees of the Indemnity Scholarship Program were considered pioneers in modernizing various social and academic domains in China. To name a few, there were Hu Shih (1891-1962), a student of Dewey’s and a philosopher who was the first to systematically introduce Liberalism and Pragmatism, Mei I-chi (1889-1962), President of Tsing-hua University in China and in Taiwan, board member of the China Foundation for the Promotion of Education and Culture, and later on Education Minister in Taiwan, Chao Yuen-ren (1892-1982), modern Chinese linguist, Yang Chen-Ning Franklin (1922-1957) Nobel Prize Winner in Physics, etc. By describing these grantees’ profound influences on modernizing education and other social domains in early

22 Nearly twenty percent received doctoral degrees, forty-two percent Masters Degrees, twenty-six percent Bachelor Degrees, and around twelve percent did not receive any degree.
republican China in both quantitative and qualitative fashion, I do not imply that they automatically and mechanically disseminated their values and knowledge acquired in the US. Rather, their influence operated in a rather complex way that intertwined with various other discourses of nationalism and institutional practices.

Along with the discourse generated by the imperial intrusions in China, in terms of linguistic discourses, the championing of Western modernity and liberalism rooted in the European Enlightenment tradition was disseminated and permeated into Chinese social domains. For the Chinese social elites, the experiences of the defeats in wars against European, American, and later on the Japanese repeatedly reconfirmed the superiority of Western material civilization. However, based on the predominant “scientific discourse about social evolution” and nationalist discourse, a kind of imperial imagination, these Chinese elites were dedicated to reconcile Chinese philosophy and Western material civilization by forming a hybrid discourse rationalizing their imitation of Western-technology projects. For the American elites, Western enlightenment was reflected not only in material development, such as modern technology and industries, but also in their core beliefs in liberalism and human reason. For them, what the Chinese desperately needed was Western enlightenment including the sciences and Christian ethics. In this encounter between China and the West, discourses about the two sides were sharply bipolarized: China/West, Old/New, Philosophical/Material, Confucianism/Liberalism, Wild/Enlightened, etc., although these dualisms were not necessarily the reality. In any case, the Indemnity Scholarship Program for US study helped normalize and universalize, through all these educational practices, the discourse of modernization and national development of the country.
Students of the Rong Hong Project and Boxer Indemnity Scholarship Program were profoundly influential in modernizing China. Strictly speaking, the students’ individual objectives for studying abroad could be very different from that of the program. Nevertheless, it was the discursive power and institutions, and the purpose of the indemnity program that defined these individuals’ roles and shaped their future carriers. Some historians point out that the dedication of these modern reformers and revolutionists was primarily motivated by nationalism engendered by the humiliating lessons of imperialism and semi-colonialism (Crozier, 1976; Tylor, 2009). For these Western educated Chinese elites, it was the nationalist and patriotic drive that convinced them to adopt Western material development to defend Chinese national culture and race. This drive could also account for how these scholarship grantees perceived their efforts in participating in modernization projects in China and later on in Taiwan. However, such nationalism is actually a by-product of racism constructed by imperial discourse, which nevertheless was never considered by these Western educated elites (Ye, 2001). In the end, it is this protagonist racial, national, and cultural dualism about America and China created by the imperial discourse that further fed the dualism and underlay the scholarship grantees’ dedication to modernization projects in China and later on in Taiwan.

At this point, it would be helpful to briefly use Hu Shih (1891-1962) as an example of the grantees of his generation, since his vital influence in creating a hybrid culture, I would argue, actually mirrors a type of post-coloniality. Through the Indemnity Scholarship Program, he went to the US in 1910 at the age of eighteen and studied philosophy with John Dewey at Columbia University. His autobiography demonstrated a typical displacement that most of the scholarship grantees experienced during that historical transitional phase from the late Tsing Dynasty, through the chaos of the early republican China and the two world wars, until the Chiang Kai-
shek government retreated to Taiwan in 1948. Upon Hu’s return to China in 1917 he was invited to be a professor at Beijing University and launched his influential role occupying key positions in the scientific and academic world, as well as in government, such as being the Chinese republic’s ambassador to the US. Hu was one of the most important figures in the New Culture Movement in 1920’s China that advocated democracy and science for regenerating a new China. He was also a major contributor in initiating the Chinese literary revolution favoring Chinese vernacular literature (Chou, 1984). Moreover, after the Chiang government retreated to Taiwan, Hu served in several key positions both in the US and in Taiwan, such as president of Academia SINICA in Taiwan. In Taiwan, he furthered his advocacy on the significance of science and democracy.

Hu’s perspectives and lifelong scholarship largely reflects the “subconscious conflicts and dilemmas and struggles of the Chinese elites” (Chou, 1984, p. vi). I would argue that in an active sense, these struggles made him devoted to forming a “new” Chinese culture — also a hybrid kind. America for Hu as well as for many of his contemporaries seemed to become “an object of desire” (Yoshimi, 2007). I would propose that as one of the most critical pioneers advocating Liberalism, Democracy, Individualism, and Pragmatism in China, Hu’s scholarship emphasizing the “scientific spirit” in interrogating Chinese literature and philosophy actually reflects a reconciliation of his desire for the American model of modernity and his respect for his native culture. This dilemma in fact mirrored an imperial/semi-colonial discourse of dualism between American Enlightenment and Chinese civilizations, or between the Chinese and their other.
Modernization in Taiwan During Japan’s Colonization

After reading the drastic discursive combats via political, economic, military, and cultural powers in China, one shall not forget that the Tsing government ceded Taiwan to Japan after the First Sino-Chinese War in 1894. Since 1895 Taiwan had undergone a very different history until Japanese colonial government left in 1945. After successfully westernizing its military, Japan started its plan of expansion in Asia. On geopolitical grounds, Japan requested the Tsing government to cede Taiwan to her and Taiwan remained a Japanese colony until 1945 when she was defeated in World War Two (Hsü, 1999). Precisely speaking, the systematic modernization projects in Taiwan started from this Japanese colonization. During this period, modern industrial and education system from elementary education to higher education were established for the Japanese colonial interests.

Since as the Boxer Indemnity Scholarship Program started in 1907, Taiwan was already Japanese colony. To unmask the paradox of modernization discourse, a grasp of Japan’s modernizing projects accompanying with colonization in Taiwan is instrumental here. Literatures focusing on Japanese coloniality in Taiwan and its long-term impact have been abundant and continuous to increase, and the present brief introduction of Japanese colonization in Taiwan by no means attempts to exhaustedly articulate another new perspective. Since the main purpose of this section was to render a context for the complex threads of modernity of the resumed scholarship in Taiwan, this section will primarily focus on a condition facing with Taiwan during Japanese colonization and its legacy. The understanding of this condition allows one to see that Modernization could be hardly conceived of neutral and linear historical path; rather, its disperse in Taiwan was coupled with imperial and colonial purposes. Moreover, the general understanding of Japanese colonial modernization in Taiwan also problematized the
Chiang Kai-shek government’s claim that needs of Taiwan’s society for modernization. In other words, the colonized history of Taiwan provoked a complex of the KMT government toward Taiwan as Japanese, which further complicated the post-coloniality of Taiwan.

**Modernization or colonial governmentality?** In the traditional Chinese-center imagination, Taiwan was a desolate island occupied by uncivilized savages, pirates, or anti-Chinese rebellions (Teng, 2004). It was not until the late 19th century the Chinese Tsing dynasty firstly recognized Taiwan’s geographical role after the defeated experiences against British and French imperial expansion in Asia. Since 1885 until 1892 the Ching government sent two governors, Liu Ming-chuan (劉銘傳) and Shen Bao-jen (沈葆禎), to Taiwan to initiate several fundamental modernization projects. During this very short time light industry was introduced, public education system, modern postal and telegram service was firstly introduced, and a railroad connected North and Northwest coast Taiwan was constructed (Liao, 2006).

Soon afterward, China ceded Taiwan to Japan in 1895. Since then Japan furthered a wide series of systematic measures to “modernize” Taiwan. Being Japan’s first and last colony, Taiwan was perceived crucial by Japan for its expanding project of “Empire’s South Advance (帝國南進, Mashiro, 2006)” aiming to build up his Greater East Asia Co-Prosperity Sphere (大東亞共榮圈). The wide range of modernizing projects served as a solid foundation for Japan plans. These projects were such as establishment of modern education system, including higher educational institutions that not only educated but also generated knowledge of Taiwan. For instance, Japanese colonial regime initiated the very first census and continued on a periodic base, investigated indigenous people, naming and classifying them as well as other ethnicities. Additionally, scientifically measuring and mapping out Taiwan was also one critical endeavor conceived as of Japan’s “major contributions” in terms of modernization in Taiwan. The very
first time in the history, the ruler in Taiwan knew exactly the number, the diversities, and the behaviors of the populations in Taiwan. The landscape, the biological species, and geographic features was clearly documented and illustrated. With the institutionalization of higher education, modern scientific subjects, such as anthropology, biology, medicine, botanicals… were firstly systematic introduced and institutionalized. By then, the Tsing government had not knowledge at all about their subjects, not even the population number in Taiwan.

The paradoxical relationship between these Modernization projects and Japanese colonialism in Taiwan, as Yao Ren-to’s work pointed out that colonial knowledge in this colonial background, as a particular technique, made it possible for “colonial state to know, understand, study, scrutinize, and investigate the subjected people” (Yao, 2006). Based on Michel Foucault’s concept of power/knowledge and governmentality, Yao exemplified all different kinds of numbers and surveys conducted by Japanese regime in Taiwan to eloquently articulate the utilitarian necessity of these scientific investigations and knowledge generated for the Japanese political rationality.

In spite of Japanese colonization in Taiwan, what remained puzzle for many scholars, such as Leo T.S. Ching (2001, pp. 8-9), is that a majority of Taiwanese seemingly had a relatively positive, sometimes nostalgic, attitude toward the Japanese colonial time, which was very different from other previous Japan’s colony, such as Korea. Toward the historical experiences of Japan’s colonization, Korea spoke about confrontation and opposition, while Taiwan was inclined to speak about modernization and development.

By pointing this out, Ching furthered, Taiwan’s paradoxical experiences might be not only because of Japanese colonial time in Taiwan was twenty years longer then it was in Korea, but also because of Taiwan’s nuanced relationship with the KMT government and now with the
Mainland China. Ching investigated how Japan utilized different colonial practices, integrating social/educational practices and cultural discourses, that assimilated Taiwan and provoked the emergence of Taiwanese “triple-consciousness” – (n)either Chinese (ni)or Japanese, but/or Taiwanese. This triple-consciousness can be best exemplified by Wu Chuo-liu’s work of *Orphan of Asia*. Wu Chuo-liu (1900-1976) is a significant Taiwanese writer and journalist who lived through Japanese colonization and experienced Chiang Kai-shek Chinese Nationalist regime. In this novel, Wu described how a Taiwanese became insane due to identity risks caused by the double negation and suppressions of Japan and China, since Japanese considers Taiwanese as Chinese that need to be modernized, while the Mainland Chinese regard Taiwanese as traitors23 and products of Japanese colonization that need to be de-colonized. From this novel that inherently reflected personal experiences, Ching featured the Orphanization of Taiwan: an emerging ideology of abandonment after Taiwan undergone multiple foreign governance. His interrogation into Taiwan’s muddy identifying struggles concealed a complexity resulted from the Japanese colonial and Chinese semi-colonial histories in Taiwan. And these histories exerted ongoing influences on Taiwan’s successive unfolding after Chiang Kai-shek government retreated in Taiwan.

This really brief illustration did not mean to judge and discuss the multi-dimensional complexity of Japanese colonization in Taiwan, but to serve an introductory purpose of understanding Taiwan’s complex condition before the Chiang Kai-shek government retreated to

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23 More specifically, given the fact that during the Japanese colonization many Taiwanese worked for Japan and were conscripted by Japanese military fighting against China, it was commonly embraced that “the Chinese Nationalists had ambivalent feelings towards the Taiwanese” (Jacobs, 1991).
Taiwan. On the one hand, under Japanese colonization the so-called “modernity” was systematically introduced to Taiwan in large scaled; on the other hand, Japan’s colonization followed by Chiang Kai-shek’s governance in Taiwan led to Taiwan’s complex identification and discrimination issues. And the understanding of this complex legacy further indirectly explains different trends of study abroad during the Japanese colonization and later the Chiang kai-shek regime in Taiwan. While in the former time Taiwanese students usually went to Japan for advanced education, during the latter time they were inclined to go to the United States.

**Conclusion**

In this chapter, I concisely depicted the inception and institutionalization of discourse of modernization through policy measures and the Boxer Indemnity Scholarship Program in China, which was followed by a preparatory portrait of Taiwan’s modernization process during the Japanese colonization between 1895 and 1945. The former description was an attempt to unmask the complex interaction between power of politics, economics, and cultural discourses. Discourses emerged and propelled occasionally by structural and occasionally by contingent factors. They would be institutionalized and perpetuated, but they were also dynamically generative.

As the productive discursive power dynamisms in Rong Hong Project and Boxer Indemnity Scholarship demonstrated, fellows played a critical role. By so saying does it not mean that the influence of grantees merely consumed the dominant discourses and reproduced them in a mechanically replicative fashion. Rather, it was a complex composition of colonial discourses of nationalism and racism, in addition to the imperatives of the program that partially mediated their reflexivity and practices, and eventually defined their crucial role in “Modernizing” early republican China. Namely, in order to defend the Chinese nationalism, they
were negotiated to learn the “utilitarian” part from the Western advancement and Enlightenment. Nevertheless, as it will be demonstrated further in Chapter Five, discourses of Modernization for development did transform and shift, in particular in a very tricky condition during the Cold War where Taiwan was situated.

In terms of Taiwan, a brief introduction about the Modernization projects conducted by Japanese colonial state allowed one to see another historical trajectory Taiwan experienced when it comes to “Modernization”. Japanese colonial modernization inscribed Taiwan in multiple and ironic ways. It marked a milestone that Taiwan officially entered a “modern” age; meanwhile the milestone also foreshadowed an identity complex for Taiwan: firstly abandoned by Chinese to Japanese due to its marginality, then regarded and subjugated by Japan as Chinese, and again returned to the KMT government and conceived of traitors who needed to be de-colonized with Chinese nationalism.

All of these historical contingencies coupled with discourses bundle of nationalism, modernization through technological and scientific development, converged in Taiwan along with the KMT government retreated in Taiwan in 1948. As we shortly will see, discourses produced by different historical incidents, even under the same name of Modernization, also interacted and interwove in the scholarship program after it was resumed in Taiwan since 1955. Along with the unfolding course of the scholarship until 2000, one sees how discourses mixed with Chinese nationalism, anti-communist enterprise, modernization through scientific/technological and economic development flowed almost the first twenty years since its resumption. These discourses were followed by other discourses such as deregulation, liberalization, key technologic, Taiwanese subjectivity that eventually also transformed and
merged with discourses such as flexibility/mobility, and education as individual entrepreneurship, which could predict arrival of a globalized neo-liberal discourse after 2000.
Chapter 5
The Shifting Discourses of National and Social Development

Introduction

The scholarship program was revived in Taiwan in 1955 after the Chiang Kai-shek government retreated to Taiwan in 1949. This chapter analyses the discourses on the program between 1955 and 2000 based on utterances collected from state and related policy documents, such as the 300 volumes of Public Bulletins of the Ministry of Education, the Executive, Legislative\textsuperscript{24}, and Control\textsuperscript{25} Yuans. In addition, around 220 pieces of newspaper reports from three major newspapers, that is, the \textit{Central Daily News} (中央日報), \textit{United Daily News} (聯合報), and the \textit{China Times} (中國時報), the autobiographies and narratives of scholarship recipients and statements by government executives are included to better understand the discourses.

Based on the observation of discursive shifts and entanglement throughout different stages of the program, this chapter suggests regard the scholarship program as a means to achieve an adaptable blending for the modernization of Taiwan. By sending selected students overseas, Taiwan could appropriate the modernity of advanced countries and also use that to extend her influence. As such, the program as a means of strategic modernization does not necessarily focus on a linear goal to be achieved someday; rather, the concern with being excluded from international society (due partly to historical contingencies) forced Taiwan to keep her international links. In this context, both Chinese and Taiwanese nationalism played critical roles at different stages of the program. Moreover, as illustrated by the unfolding of the

\textsuperscript{24} The Legislative Yuan is the Congress of Taiwan.

\textsuperscript{25} Control Yuan is in charged of supervising, controlling, and auditing all levels of government’s functioning and assuring their governance follow legal regulation.
program and its situational contexts, and though American modernity had a continuing influence on Taiwan, stakeholders in the program were concerned with potential issues caused by an overdependence on the US and modified the program accordingly.

These modifications, however, further featured the double-sponge and double-edge of the program. On the one hand, the program was designed in an imperial and semi-colonial context to study the superiority of advanced countries, which reflected the non-alternative nature of the strategy. By integrating the particular strengths of different countries, Taiwan seems to have modernized successfully. On the other hand, an inherent problem of Taiwan’s strategic modernization lies in its tendency to inherit “advantages” that *per se* actually need to be critically challenged. For instance, the concepts of competition and advanced human resource development all need to be clarified. Nevertheless, for Taiwan, an easy benchmark that could be readily found was based on those from the advanced Western nations. While learning from these countries did not necessarily involve total imitation, it was still unclear to the interviewees as to how Taiwan could adopt the benefits without also inheriting the downsides.

To better understand this concept, four different phases of the scholarship program since it was resumed in 1955 until 2000 are identified as the Resumption (ca. 1955-1959), Emerging (ca. 1960-1975), Expansion (ca. 1976-1990), and Transformative (ca. 1991-2000) stages. These stages should not be seen in either a linear or a distinct way. Rather, they provide a referential framework not only for an ethnographic illustration and understanding but also for discursive shifts in relation to the broader social and international context. Further they allow one to see how this scholarship, as a major component of the so-called international education of Taiwan, was conceived as an indispensable strategy for the nation.
The number of scholarship recipients or grantees across the 45-year span as shown below can serve as a starting point. The upward trend in the number of scholarship recipients between 1955 and 2000 require an ethnographic understanding of the process as well as the need to critically examine the discursive shifts operating within the context of the broader structural changes of economic and political factors.

Table 2

*Number of Grantees, 1955 - 2000*

<table>
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<th>Year</th>
<th>USA</th>
<th>UK</th>
<th>Canada</th>
<th>France</th>
<th>West Germany</th>
<th>Australia</th>
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Note:
1. *The figures for the years represent the numbers selected by the MOE. These could vary from the actual numbers of those who went abroad as some might have withdrawn from the scholarship program or switched to other countries.
2. ** Based on the actual numbers going abroad on the program, mostly from the MOE (MOE, 2008d).
3. *** The annual numbers were compiled from Wang’s study (1992a) which provides a list of grantees’ names and designated fields of study without naming the destination countries. Based on data available, there is no way of determining why countries were not specified by the MOE.

Source: Compiled from Jseng (1997), Wang (1992b), Ministry of Education (2008d), and interview data.

**Ethnographic Perspective: Strategy for national and social development.** Based on information from official documents, newspaper reports, and interview data, the different stages of the scholarship program were modified accordingly to satisfy Taiwan’s needs in the constantly changing international environment. Official statements and documents about the program focused more on implementation and issues thought to be related to improving the program to meet national and social development goals. As an “open system” the scholarship program was designed to respond to various societal changes and as a form of survival strategy. It took into account domestic and international societal shifts and modified various technical issues, such as foreign language requirements, criteria for grantee selection, examinees qualifications, study fields and destinations, as well as the duration and value of the sponsorship. In spite of all of these adjustments, the overriding discourses remained stable.
The scholarship program was designed to cultivate talented human resources to facilitate national and social development. It was believed that through selection of students via a national central examination, sending them to study the strengths and advantages of developed countries, and requiring them to return to Taiwan to contribute to nation building, the goal of developing Taiwan in a comprehensive fashion could be reached. Since the US was the predominant world power during the 45 years of the program, most students headed there although many also went to other west European nations, such as Britain, France, and Germany. Despite being subject to numerous debates and undergoing many shifts on issues such as the required education levels for recipients (college or Masters/Doctoral graduates), selection criteria and methods (exams or reviewing of proposals), as well as on designated fields of study, the goal of developing the nation by educating talented students, especially those from the lower socio-economic strata, remains constant and the program has been considered to be a success. In particular, by increasing the number of the students and their strong influence in the Taiwanese government and academia, the nation could not only gradually develop by keeping current with the latest developments in advanced countries, but could also blend these advantages into her own inherent traditional strengths.

This is evident through the several themes that emerge in the accounts of the interviewees. Basically, almost all of them agreed on the significance, whether visible or latent,

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26 Here I use talented human resources, or the talent to foreground the idea of “Ren-cai” (人才). The usage of “cultivating the talents” in Mandarin Chinese emphasizes more the gift of people. And “cultivating the talents” also had been seen as one crucial mission of state intervention in education.
of the scholarship program in relation to Taiwan’s national and social development although
there were different perceptions among them on what such development meant.

From the perspective of policy makers and program administrators, the primary aims of
the scholarship program included providing funding for students from the low socio-economic
strata to pursue education abroad, generating skilled human resources, and ensuring the nation
kept abreast of international trends and developments. In other words, the scholarship program
not only provided students who could not afford to study abroad an opportunity for upward
mobility in Taiwanese society but also contributed towards keeping Taiwan on par with major
international trends in different fields of study. More critically, this program could boost
Taiwan’s ability to advance its emerging technological and industrial development agenda. The
experiences of the students convinced them that despite some minor technical defects the
program could play a crucial role in Taiwan’s modernization since it successfully created a large
pool of talented educators, scientists, and administrators.

Five major themes emerge from the accounts of the five scholarship recipients: public
funding for upward social mobility, prestige and honor, career stepping-stones, sense of mission,
and academic and cultural expansion. The basic motivation for applying for the program was the
financial support it would provide. All five were from families that could not financially support
their overseas study aspirations. The scholarship program provided the means to realize their
ambitions of studying abroad and to enable them advance to a higher social status such as college
professors or governmental officials.

The second theme is the prestige associated with the scholarship and scholarship fellows.
Adding to the sense of exclusiveness and competition was the fact that there was only one place
awarded for each designated field of study. Mirroring public perceptions, four of the five
grantees were proud to be identified with the scholarship program and the recognition that came with it both in a symbolic and real sense.

The program as a potential career stepping-stone was another crucial consideration. Four of the recipients considered their fields of study as either completely new or pioneering in Taiwan that needed their contributions, while the fifth viewed her field of study in the context of the ending of diplomatic relations between Taiwan and the US which made it vital for Taiwan to have people involved in managing and promoting the international image of the country. Since their research specializations were considered as new or for keenly needed human resources, scholarship students could easily secure positions in government and academic circles in Taiwan, although they faced different challenges in doing so. Recipients in the earlier stages were better accepted and respected in the job markets compared to later batches, and, in contrast to their doctoral-degree contemporaries, also received greater opportunities. For instance, two early-stage recipients noted that they were offered positions in leading universities even before their return to Taiwan, with one assigned a dorm as part of the compensation package. The other two found jobs almost immediately at leading universities in Taiwan upon their return, while the other chose to stay overseas and was confident that he would be able to find a position that would enable him to contribute to the nation.

From the micro perspective, all of them expressed different degrees of a sense of mission and responsibility. Most mentioned that they appreciated the financial support enabling them to fulfill their aspirations of studying abroad and also their sense of mission. On a general level, this sense of mission drove them to do their best in their academic work and social life. In particular, they felt both the excitement and the obligation to serve the nation whether locally or while overseas. In this regard, four believed that their contributions in different fields indirectly
assisted in promoting Taiwan’s national and social development agenda. This sense of obligation for nationalism is somewhat close to what Lisa Hoffman termed “patriotic professionalism” (2010), or what Vanessa Fong called “filial nationalism” (2004). Although both of the concepts were developed from the contemporary social contexts in China that is very different from Taiwan, they provide referential frameworks for understanding a discursive entanglement of nationalism and professionalism and how they could become driving discourses to each other.

Finally is the theme on their positive attitude towards academic development and cultural issues as well as a better appreciation of different cultural contexts while abroad. This attitude was expressed in various ways. First, all of them recognized the high living standards and fields of study of their host countries. From the social standpoint, they noted that cultural learning, understanding, or conflicts they thought could help in grasping different cultures or appreciating why and how countries become advanced. The process of understanding and adjusting to different cultural contexts is multi-dimensional arising out of their daily interaction in the academic environment as well as with the community.

Roles of the fellows in different eras. In a broader context, scholarship fellows in particular eras played critical roles in different ways. In the mid-60s to the early 70s, they were more like pioneers and planners for the next generation, and because they were few they were greatly in demand. Their overseas studies were considered significant not only in bringing knowledge back to Taiwan but in the fact that they themselves became policy planners in Taiwan. Driven by a grand discourse of building Taiwan as a model province following Dr. Sun Yat-sen’s *Three Principals of the People* for a new China. Taiwan was viewed as a blank sheet

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27 “Following Sun Yat-sen’s Three Principals of the People to build Taiwan as a model province for a new China” can be seen as zeitgeist between the 1950s and 1970s. This statement
of paper by the KMT government, on which to blueprint national development in the anti-communist effort for a new China. Since the mid-70s until the early 1990s, the bigger group of such elite formed and consolidated the government and academic sectors although they were also in demand by other sectors. They expected to make significant contributions to nation and society by attempting to integrate their acquired knowledge with the “national culture” in spite of the fact that the Chinese national identity was starting to become unstable and Taiwanese identity coming into being. On the other, they experienced and facilitated many political, economic, and cultural changes. Up to the 1990s, the scholarship recipients were still very much respected; nevertheless, a tightening job market in Taiwan resulted in the marketization of higher education in the context of globalization, and as such the sense of contributing to Taiwan was no longer bound to territory. Rather, what emerged was a discourse of mobility suggesting that students remaining overseas could still contribute to Taiwan. This meant that they could do so by contributing to their individual professional fields in a more substantial fashion and at the same time enhance the global visibility of Taiwan. In this sense, the fellows became roving agents; they were allowed and sometimes even encouraged to travel for national and personal benefits.

Based on this ethnographic illustration the program could be termed as an adoptive strategy used by Taiwan government not only to actively borrow and acquire the benefits from advanced countries but also, in a more passive sense, to keep in touch with the international originated from Chiang Kai-shek’s diary in 1950 where he stated “building Taiwan as a model province of Three Principals of the People for a new China that has governance of the people, by the people and for the people (建立台灣為三民主義模範省，以建立民有、民治、民享的新中國) (Yin, 2009).
area mainly in developed North America and Western Europe. However, from the perspective of critical discourse analysis, this portrait is more complex and could be analyzed further.

**Discourse: Shifting discourses under national and social development.** By quoting Bakhtin’s notion about chains of relational utterances in language, Fairclough (2003) points out that when a word, a discourse, a language, or a culture becomes relativized, de-privileged, and aware of competing definitions for similar things, it undergoes *dialogization*. “Undialogized language is authoritative or absolute” (p. 42). Being attentive to both dimensions of dialogization and un-dialogization of a language or a discourse sensitizes one to a broader chain in which the researched language or utterance is embedded. And it is this attention that allows the tracing of a chain of statements under a covering discourse of national and social development of the scholarship program in various stages.

Under the overarching discourse of national and social development, the scholarship program was driven by various agenda including the need to provide opportunities for outstanding students from lower socio-economic backgrounds, training for the nation’s development program, pursuing modernization through advanced scientific/technological knowledge, economic growth, strengthening human resources for the anti-communist effort and rebuilding the Chinese nation, as well as internationalization and sustainable development. Many earlier or current debates on the purposes of the scholarship, the importance of having students return to Taiwan, formulating fields of study to adequately reflect national and social development needs, identifying appropriating host countries, etc, all reflected some inherent discursive paradoxes. Eventually the program has been viewed under the overarching discourse of “national and social development” covering various statements in different stages.
For instance, with the increasing influence of returning American-educated fellows of the Boxer Indemnity Scholarship Program, the Chiang Kai-shek administration established close links with the US that were further strengthened in the post World War Two era. The CKS government always harbored the intention of returning to the mainland and all government initiatives before Chiang Kai-shek’s death in 1975 were focused on that objective. In that context, the objectives of national and social development in Taiwan were primarily for the purpose of defeating the Chinese Communist Party and for building up the new China. Therefore, the need to send students overseas was to develop and upgrade Taiwan’s human resources for the anti-communist enterprise using the advanced Western (mainly American) systems and methods, scientific and technological development, and American liberalism. In brief, the anti-communist enterprise can be seen underlying national development. While modernization and scientific development were essential attributes of the discourse, they were also tied in to the anti-communist ideological struggle.

Between 1960 and 1975, the scholarship program continued to develop within the backdrop of the CKS’s aspirations to return to the mainland. Chinese nationalism, manifested in anti-communism and using US systems and methodologies was still a critical factor. It is noteworthy that acquiring and utilizing of American assets in this case differed from the post-colonial experiences of other countries. Namely, unlike many French or British colonies the relationship between KMT-led Taiwan and the US was based on direct military involvement and cultural domination. Incidents and events over the years had built up a paradoxical relationship between the two governments, which was neither a type of colonial domination or imperial imposition, nor the kind of relationship that existed between Communist China and the Liberalist US which much literature focuses on. Since the 1950s until the late 1980s, the scholarship
program underpinned Chinese nationalism which insisted on maintaining its own cultural values while integrating and assimilating the benefits of Western modernity.

From the mid-1970s until 1990, the international economic crises and domestic and international political dilemmas forced Taiwan to undergo a series of dramatic changes. On the international front Taiwan started experiencing a sense of marginalization although the country’s robust economic growth and technological development strengthened its linkages with Western countries. Domestically the lifting of martial law opened the door to political decentralization and liberalism. This instability was reflected in the many adjustments made to policies and programs of overseas study and was in response to these broader reconfigurations. The discourse on economic development, however, predominated and was intertwined with the emphasis on developing key technological and scientific knowledge. This, however, does not mean that the China factor disappeared: in fact it was still a crucial element not only in Taiwan’s economic expansion (Chu, 2009) and pursuit of developing several so-called “key technological and scientific developments,” but also in the approach to overseas education.

Between 1990 and 2000 developments in the scholarship program went through another significant discursive shift. The scholarship program widened its scope to include, in addition to the US, countries from the previous Soviet Union, East Europe, South East Asia, and the Middle East. This expansion was the result not only of the dissolution of the Soviet Union and East Europe, but also due to Taiwan’s economic expansion. Moreover, it reflected the switch to a Taiwan-centered subjectivity, in contrast to the previous Chinese-centered nationalism focused on returning to China. At the same time, the scholarship program per se again confronted the challenge of existential challenges by the neo-liberal discourse of education as an individual entrepreneurship. Towards this end, there were attempts to replace the traditional scholarship
program with a grant and loan program, but owing to various factors they were not launched.

**A strategic development for survival.** The statements on the program and their links with the broader structures and contexts in which it and the interviewees operated is not to say that the program was an undisputed, coherent, and effective strategy to help Taiwan modernize towards becoming a developed country as much of the literature indicates (e.g. Lin, 1976; Wang 1992a, 1992b). Rather, the program and the development strategy were constantly challenging and shaped to meet the various situations faced by Taiwan. Although the program was filled with utterances of scientific, technological, and multi-dimensional modernization aspirations, these nevertheless reflected the various dynamisms confronting Taiwan such as the choice between liberalist and socialist routes to modernization, Chinese and Taiwanese nationalism, American modernity, and a fusion of those contesting statements. As a strategy utilized by Taiwan’s government, acquiring and absorbing knowledge in various fields and cultures, particularly from developed countries, not only allowed Taiwan to adapt to these trends to “develop”, but also allowed her, despite being marginalized in the international arena, to remain in tune with advanced countries while developing its own position in the nexus, which indirectly provided her with an invisible protective cover deflecting her over political tensions with China. Viewing the scholarship as an adaptive strategy does not imply that Taiwan benefited unreservedly in the nexus with the western countries, primarily the US. Rather, as the idea of “survival” indicates, Taiwan constantly adjusted to a situation in which its own position continuously compromised to sustain itself.

Accordingly, the Taiwan’s modernization must be understood from the perspective of the program’s different stages. For the CKS government, burdened by the humiliation of Western imperialism, the core idea behind modernization was to acquire and utilize other’s “advantages”
rather than purely imitating and transplanting them. In other words, although the process was inevitably tinted by American modernity, modernization and development in Taiwan’s context eventually differed from the American model. Ultimately, although the benefits of American modernity were desired there was also the need to integrate them with Chinese strengths and that of other advanced countries.

The tendency of closely following international trends inevitably lead Taiwan to emulate the so-called advanced countries of North America and West Europe that still maintained imperial and colonial legacies in different forms and degrees. Similar to emerging China and Southeast Asia, Taiwan’s influence through economic investments, technological innovations, and cultural dissemination also transformed her into a regional cultural and colonial power that was not without its criticisms (e.g., Chen, 2010). And this is also a criticism I would like to make by distinguishing the implicit “double-edge” of the scholarship program.

At the micro level, the interviewees’ accounts reflect the different degrees of the discourses as they underwent the various stages. It is understandable the interviewees put more weight on the beneficial aspects that had less to do with broader structural shifts. Nevertheless, their individual narratives actually complement the textually oriented discourse analysis in filling the gap between the way in which scholarship fellows fulfilled their expected roles and, at the macro level, the way the scholarships were used as a strategy to respond to the different structural dynamics confronting Taiwan. In other words, while promoting students’ overseas education and allowing them to serve at home or abroad, Taiwan could benefit through their linkages with the advanced world. The anti-communist effort, modernization through scientific/technological development, and economic/political liberalization, might not figure
directly in the objectives of the interviewees but it was the appreciation, respect, and responsibility of being a scholarship fellow that drove their contribution to these discourses.

As discussed in chapter 2, current post-colonial theories seem to be loosely generalized to many third world countries and ignore the complex political-economic, geographic, and cultural difference in the rest of the world. In Asia, in particular, Ong’s many observation and concepts about *Graduated Sovereignty*, *Flexible Citizenship*, *Zoning Technology* (2009) in the development of the East Asian Tiger Economies have provided more sophisticated lenses that analyzed many contemporary phenomena in the Asian context. Ong’s argument of “alternative modernities” (1999, p 32) offers a broader referential framework on which the present research could build on by further dismantling the different case offered by Taiwan. Using East and Southeast Asian countries, Ong maintains the concept of alternative modernities that are “constituted by different sets of relations between the developmental or post-developmental state, its population, and global capital” and “constructed by political and social elites who appropriate ‘Western’ knowledge and represent them as truth claims about their own countries” (ibid, p. 35).

Ong clarifies that the idea of “alternative” does not necessarily suggest a critique of, or opposition to, capital (ibid, p. 35). She articulates that the Asian Tiger countries, most of which were colonized, are currently identified as development states through strategic planning, and perceive their engagement with capitalism, not as post-colonial, but rather as a foreground to their “emergent power, equality, and mutual respect on the global stage” (ibid). In quoting Barlow (1991), Ong eloquently points out that the Chinese intellectuals’ views of representing “their nation as modern without being Western” therefore is more like “a method that considers how nation-states, in shaping their political economies and in discursively representing
themselves as moral-political projects, while borrowing extensively from the West, also seek to deflect the West’s multiple domination” (p. 36).

Although Ong’s work characterizes many strategic dimensions utilized by the Tiger Countries that further bring out the alternative modernities, one should also be aware of the fact that in terms of size, history, culture, and geographical location, there have been differences among them. For instance, in terms of size and geographic location, Singapore, Hong Kong, and Taiwan might be considered by Western imperial powers as tiny countries possessing critical geographical significance. Nevertheless, while the former two were British colonies, Taiwan was governed by a traveling Chinese regime following colonization by the Japanese and which was considered regional imperialism by Western nations. To be more specific about Taiwan, although Ong’s example of Chinese intellectuals’ views considerably combs out the existing discourse of “alternative modernities” in the Chinese context and how it was projected to balance Western power, this view actually provides a different perspective of the dynamic dimension of the relationships between China and the West. This provides only a partial explanation for Taiwan since for Chinese intellectuals the borrowing of Western modernity was not only to negotiate with Western powers, but also to achieve a bigger China encompassing a wider and different kind of alternative modernity. In this sense, Ong’s argument of alternative modernity outlines a framework that requires filling in more details that distinguish them from others.

The investigation of the scholarship program for overseas education as one of the most critical projects in pursuing “modernity” is now presented. In the various stages of the program one sees how as a kind of educational policy it was influenced by the various discourses that emerged from particular conditions, how the program was modified in response to these
changing conditions, and the experiences of the fellows, policy-makers and program administrators.

**1955-1959: The Debate on Resuming the Scholarship in Taiwan**

The Boxer Indemnity Scholarship Program was adopted in Taiwan during this stage. First, the influence of the program was in the fact that it institutionalized not only the practice of sending elite students abroad, but also the discursive meaning of the scholarship program. Grantees played a critical role not only in restarting the program but also in directing the development of Taiwan’s national policies as a large number of them and the faculty and staff of Tsing-hua University also followed the CKS government to Taiwan (Tsing-hua University, 2010).

Various factors, such as the Cold War and the influence of grantees from the *Indemnity Scholarship Program* generation, favored the resumption of the program. Under the leadership of Mei I-Chi, Tsing-hua University resumed operations in Taiwan in 1952 and the scholarship program followed in 1955 (Lin, 1976). The budget for the first two sessions of the scholarship program in 1950 and 1955 was supported by Tsing-hua University with funding from the China Foundation for the Promotion of Culture and Education\(^\text{28}\). From a discursive aspect, modernization and industrialization was promoted as a strategy for many purposes including anti-communist efforts. Moreover, fellows who acquired government positions could easily realize their plans in initiating and developing policies. As in the examples of Hu Shih in chapter 3 and Li Kuo-ting in the following sections, their understanding and networks developed with western academic circles during their overseas stay and the respect and expectations of the public played a role in their efforts to transform Taiwan into a “fortress of anti-communist enterprise

\(^{28}\) Please refer to Chapter 4 for the background of this Foundation.
and revive the Chinese nation.” The influence of this group of grantees remained profound until the early 1980s.

To contextualize the scholarship program, it is important to examine the *Rules of Overseas Studies* (國外留學規程) since national policy used them as a basis for managing overseas education before they were abolished in 1990. Moreover, the rules were also reflective of the many discourses on national policies for such study. These discourses also allow one to see the meaning of overseas studies as a particular discursive product of modernization that further shaped and was shaped by the various discourses at different stages.

The *Rules of Overseas Studies* was firstly released during the republican government in China in 1933 (MOE, 2011a). It was discontinued in 1938 and a modified version was used in 1944 (MOE, 2011b). This primary regulation governed all overseas students whether funded by the government, self-funded, and those sponsored by foreign organizations and aimed at managing all affairs concerning overseas study. In principle, students were required to take a national exam before proceeding abroad irrespective of their funding sources (Public Bulletin of Taiwan Province Government29, 1947) and were examined on their proposed research topics, Chinese national history and geography, and foreign language proficiency. In addition, the regulations set various criteria such as degree requirements, application procedures and

29 Before 1997 the KMT government claimed its sovereignty extended to Mainland China and Taiwan was only a local government. As such there was a central as well as a local government in Taiwan. In 1997, the Constitution of Taiwan experienced a dramatic shift in the way that Taiwan Province was regarded where the provincial government was downsized and partially integrated with the central government.
documentation required\textsuperscript{30} (Public Bulletin of Taiwan Province Government, 1962, p. 5) and those admitted to the program were required to keep in contact with Chinese embassies overseas and not allowed to stay abroad for more than four years after graduation. However, over the years, these rules were gradually relaxed. Following the retreat of the Chiang Kai-shek government to Taiwan in 1949 and before the resumption of the scholarship program in 1955, several national-level examinations were held for self-funded students who wanted to study abroad (MOE, 2011c). The management of the program itself (the regulations involved, policy formulation, and establishment of managing the agencies) provided rich material for the discourse on overseas study and its institutionalization. This discourse was further sustained and institutionalized after the initial government program of sending students overseas in the early twentieth century.

In announcing the resumption of the overseas study program in the Legislative Yuan in 1955, the Minister of Education pointed out that “the policy for overseas study should be only a temporary policy measure, and its primary aim is to establish the national higher education system” (United Daily News, 1955, April 3, p. 3). While this clarified the intention to resume the program, it also gave an indication of the various challenges confronting it, such as its positioning and legitimizing as well as the unfeasibility of terminating it. After the first exam in 1955, the program was discontinued for four years due to funding uncertainties (Wang, 1992). This was also justified on the grounds that many foreign higher education institutions provided fellowships and that the United Nation sponsored 60 students annually to the US for training in

\textsuperscript{30} Initially family members were not allowed to accompany students abroad but this restriction was removed in 1984 (MOE, 1984a, p. 29; 1984b, p. 27).
science and technology and as such a state scholarship seemed redundant (United Daily News, 1956, p. 3).

During the four-year hiatus, public and intellectual discussions on the policy continued. The rationale for continuing the program was based not only on the need for scientific and technological development but also on the state’s role in supporting financially disadvantaged students from lower socio-economic backgrounds for overseas study. In the case of the former, a group of academic elites comprising university presidents and many Boxer Indemnity Scholarship Program recipients urged the Ministry of Education to balance the designated fields of study among the natural, social, and human sciences (United Daily News, 1959a, May 26, p. 3). They also suggested that the government provide the necessary incentives to ensure that state-funded students return to Taiwan upon graduation. It should be noted, however, that American aid for Taiwan’s economic and industrial development required large numbers of skilled personnel during that period and as such attracting graduates to the country and allocating them to those aid projects should not be a significant issue. For this reason supporting students from the lower income strata was a more significant reason for continuing the program (United Daily News, 1959b, June 16, p. 2).

These proposals by the academic elites revealed the concerns preventing the resumption of the program at that time: the un-balanced development among the various academic disciplines, the shortage of skilled human resources and attempts to recruit graduates for the many US-sponsored infrastructural projects, and the importance of benefitting the lower socio-economic strata students. Underlying these were the assumptions that social and human science studies were lacking in Taiwan, the influence of US aid policy, as well as the state’s role in education, particularly in post-higher education.
One could further assess those statements from the perspective of internal relationships since they also related to the question of choice. These relations also reveal the link between what was actually in existence but wasn’t or the “significant absence” (Fairclough, 2003, p. 37). Accordingly, one sees a discursive emphasis on studying abroad as an indispensible paradigmatic choice of education at different costs. The emphasis on overseas education indicated the absence of local higher education. This, however, does not mean that the latter was not available (like that established during the Japanese colonization in Taiwan) but that Western higher education was what was aspired for. In addition the important, but controversial, US aid in Taiwan’s development and American modernism was greatly desired by the people and government of Taiwan. This embracing of American modernity however must be seen in the context of the US and Taiwan’s relationship with China which until the late 1980s was based on strategic considerations, and is discussed in later sections.

In fact, efforts at analyzing the possible purposes of the scholarship program and its potential issues were more than that described above. In two editorials of the United Daily News (1960a, Jan., 31; 1960b, April, 13, p. 2) it was suggested that the government should clarify the aims of the program to enable the formulation of relevant implementation processes. The objectives of sending students overseas were to cultivate human resources purely for academic development as well as for national needs. For the former, the concern about funded students not returning would not be an issue for ending the scholarship, since academic development per se should be borderless. However, if the latter was the reason, then there was obviously a need to put in place measures to ensure students returned to Taiwan. The editorials further suggested that the practical transfer of technology to facilitate industrial development might be more critical than academic development in resuming the scholarship program.
Finally, after lengthy debates through the initiatives of these academic elites, such as Hu Shih and Jiang Meng-lin\(^{31}\) 蔣夢麟, the state officially committed to the scholarship program in 1960 with a regular budget after the first in 1955 and the subsequent four years debates (United Daily News, 1959b, June 16, p. 2; 1959c, June 21, p. 3). The terms and conditions of the program explicitly mandated the return of funded grantees to Taiwan. The number of selected grantees was still small (see Table 2) although they should be seen in the 1960s context when compulsory elementary education was only for six years\(^{32}\) and higher education students (college and university) formed less than 1.5 % of the total (MOE, 2010b).

All these discussions on resuming the scholarship reflected the several controversies surrounding the program as a means towards modernization. Although at first glance the main discussions in this stage were mainly about rationales and concerns of resuming the program, these discussions portrayed some inherent paradoxes, which became more complicated as the next stage developed. For instance, did modernization mean the transfer of technology or scientific development? What was the relationship between the state’s involvement in the modernization process and in the development of human resources? Core issues behind these questions were a territory-bounded nationalism, the problematic meaning of modernization, and the state’s role in education. More specifically, understanding these intertwined controversies

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\(^{31}\) Both Hu and Jiang went to Columbia and studied with John Dewey. While Hu was also a scholarship fellows (as described in chapter 2), Jiang self-funded his overseas education. Both of them played critical roles in the CKS government before and after its retreat to Taiwan. For instance, both of them were the presidents of Pei-king University during the early republican China in China and were appointed to important government posts in Taiwan.

\(^{32}\) Compulsory education in Taiwan was extended to nine years in 1968.
required placing discussion of the program in a broader context: the political angle (e.g., the ideological struggles between the CKS government in Taiwan and the CCP government in China); economic aspects (American commercial interests in Asia); and the cultural discourse generated by a set of scientific theories such as Development and Modernization Theory, described in chapter 3. Moreover, a deeper examination and understanding of these inherent factors also allows the viewing of the scholarship program as a strategy for Taiwan to respond to a situation where the international structure isolated but could not entirely silence the country.

**Science and technology in the anti-communist enterprise.** In the political context, the ideological struggles between the CKS government in Taiwan and the mainland CCP had many consequences. To remain in Taiwan after losing the civil wars to the communists was considered a temporary expediency. In fact, Chiang Kai-shek’s wish was to eventually return to China and this partially was a factor in resuming the overseas scholarship program. During a parliamentary session in 1955, legislators requested the administration to formulate an appropriate policy for overseas education that emphasized the development of the natural sciences, industry, agriculture, and medicine. In particular, they felt that the program should genuinely reflect national needs (United Daily News, 1955, Oct, 20, p. 3). As outlined in an education ministry report during a press conference (United Daily News, 1957, Nov. 22, p. 3) the Minister of Education, Chang Chi-yun (張其昀) pointed out that “modern national defensive power is rooted in science and industry; therefore our nation shall have long-term plans for scientific education and research.” The Minister furthered noted that:

> The development of scientific research firstly lies in the training of talented people. At the current seventeen colleges and universities, the percentage of students majoring in science and technology is 45%. The Ministry of Education shall further support continuous development of this trend. The MOE is also planning on resuming the scholarship program for overseas studies…and the designated fields of studies will focus on natural sciences.” (ibid)
These chained statements of scien-techno development/defense/overseas studies/anti-communism indicated that CKS government efforts were primarily aimed at defeating the Chinese Communist Party and returning to the Chinese mainland. Historians have suggested that before he died in 1975, Chiang Kai-shek and his KMT government were focused on returning to China. It is this anti-communist enterprise that defined the discourse on national and social development in Taiwan during that period.

The anti-communist enterprise exerted a profound influence not only in education, but also on several other areas critical to the overseas education policy. These included using martial law to control people’s movements, building up foreign reserves in preparation for military conflict, as well as seeking international recognition for Taiwan to be the legitimate representative of the Chinese nation. Since the declaration of martial law by the CKS government in China in 1948 and in Taiwan in 1949, the people’s movements were severely restricted including going abroad for education. Although there were Rules of Overseas Studies (國外留學規程), martial law complicated the issue, particularly if students abroad demonstrated even slight anti-government or pro-socialist inclinations. Moreover, when the discourse on nationalism and the conflict between the communists and nationalists was at their height, the idea of having a group of well-educated elites remaining overseas was not very acceptable to the CKS government. The ideological struggle between the CKS and CCP governments was related to the broader issue of which regime represented “modern China” in international society. Both governments struggled for international recognition as well as for the students and the overseas Chinese diaspora which added to the CKS government’s concerns on maintaining student loyalties. Accordingly, there was increased emphasis on testing students’ knowledge on national
history and geography through the *Rules of Overseas Studies* to ensure students remained opposed to Western nationalism and Chinese Communism.

**Ideological struggles and geopolitical concerns.** It would not be enough to discuss this issue without taking into account the Cold War and American involvement in East Asia. The close relationship between the US and China established through the scholarship program since the twentieth century and their alliance during the two wars make it easier to understand why in 1955 the first group of 17 scholarship students was required to go to the US (MOE, 2011d). As elaborated previously, US military deployment and aid policy in Taiwan had many implications. Militarily it was based on the *Sino-American Mutual Defense Treaty* between the two nations where the deployment of US forces in Taiwan caused tensions between China and Taiwan. Such tension increased drastically after the end of the Korean War in 1953 although American military presence prevented Chinese attacks across the Taiwan Strait. In addition, US funding and technological aid enabled the development of infrastructure projects in Taiwan in the post war era and indirectly sustained the country. This is not meant to rationalize US imperialism in Asia or to ignore the nexus between development and modernization with imperialism. Rather, it seeks to emphasize the position and role of Taiwan in the relationship between the other two bigger powers.

At the local level, the ideological struggle between China and Taiwan seemed to be about which route, socialist or liberal, that China should take on the journey to modernization. Nevertheless, on a broader international dimension, the struggles were further complicated by the volatile mix of imperialism and colonialism, commercial considerations, and geopolitical concerns, which are critical to any analysis of the scholarship program. In the social milieu of the Cold War era, Marxism or Liberalism seemed to be the only kind of modernization that could be
envisaged, since this discursive environment was framed out in the classical work of either a socialist or a liberalist modernization.

This limited view about modernity other than the above two also further prevents one from seeing the complexity between China, the US, and Taiwan and more as a China-Taiwan, Taiwan-US, as well as China-US conflict during that post-war period. Recognizing this complex relation between the three players helps one to see why in the early stages most scholarship recipients headed to the US in support of the anti-communist enterprise and eventually allowing the return to China. From this perspective, the scholarship program was utilized as a strategy. Moreover, this is also the reason it could be argued that Taiwan’s desire for American modernity should not be considered as a straightforward imperial-imperialized relationship between Taiwan and the US, but as a non-optional strategy of cooperating with the US to counter China. On the one hand, American Modernity symbolized a strong, modern, and supportive power for Taiwan to work with, even though it implicitly was intrusive to protect its own interests in Asia. On the other hand, in comparison with the socialist Chinese military threaten the American for Taiwan seemly was friendlier. This recognition of the triple play further exemplifies the political-economic-cultural complex that distinguishes itself from the trap of dualism in post-colonial theories that they set out to criticize and to go beyond, such as West/Rest or a Liberalist/Socialist Modernization. Being aware of the multiple contexts and the limited imagination fostered by other imperial powers does not mean one should ignore different responses (to these powers) in relation to national strategy developed by a group of elites consisting of the beneficiaries of the Boxer Indemnity Scholarship Program and others who had received overseas education.

**Economic issues related to the program.** The political struggle was not the only issue that came along with economic conditions in Taiwan at that time. At the micro-economic level,
foreign reserves required by the overseas study program was the first issue facing the CKS government, since having sufficient foreign reserves in difficult financial situations due to the need for a strong defense keenly affected the governments’ approach to overseas education. A legislator urged education authorities not to allow foreign reserve policies influence overseas studies (United Daily News, 1959, July 5, P. 3). This concern was also much related to developing an economy that could sustain itself in difficult times. As such, market liberalism was adopted. As explained in the previous chapter, in the 1950s and 1970s, Taiwan was deeply influenced by the early generation of elites who had returned from abroad as well as by US aid and as such adopted a liberal approach which, according to modernization and development theories, is utilized as a guideline for developing the country’s industry and economy for the ideological purpose of pursuing the anti-communist agenda and returning to China.

1960-1975: Social and National Development coupled with Brain Drain

Since its resumption in 1960 the program grew gradually. Its national and social development objectives were successfully legitimized as from 1960 to 1970 it expanded steadily with the number of selected grantees and designated fields of study increasing from ten to twenty during that decade. While the anti-communist effort was related to nationalism, the brain-drain, and the state’s role in education, most critical for the scholarship fellows was the way the program dramatically changed their lives. Also although national and social development needs were the main reason for continuing the program, it continued to be challenged especially in regard to promoting the anti-communist agenda through the development of human resources. Much of the paradoxes in both discursive and technical dimensions actually impacted on the proposal by the MOE to terminate the program and to implement a new type of scholarship
around 1971, although eventually many political and economic factors as well as the discourse of national development all favored maintaining the current program.

**Discursive entanglement in a minister’s speech.** In 1963 the Minister of Education Minister, Huang Chi-Lu (黃季陸), gave a speech to a group of college students about the policy for overseas study. He elaborated on the program saying “Today’s policy for overseas study is to send a great deal of young students for overseas study. Eventually, the government would gradually decrease the number of students for overseas study and attract numerous foreign students to our country for study” (United Daily News, 1963, May 22, p. 2). He further noted that “to remedy the underdeveloped science and technology in our country there is no alternative way other than sending talented students for overseas study. Moreover, the critical mission of rebuilding the nation upon returning to China will desperately require a considerable number of talented elites. Therefore the current relaxation of the policy for overseas study was for cultivating talented people to recover and rebuild our nation.” He appealed to “modern youths to integrate personal dedications and achievements with national progress.” Moreover, he explained that,

> the core issue of students studying abroad lies not in controlling and mediating the numbers of students studying abroad. Rather, it is a matter about whether the students studying abroad could really learn advanced science and technology to shorten the scientific and technological distance between our nation and the world. (ibid, p. 2)

The Minister’s speech can be further analyzed from Fairclough’s existential (what exists), propositional (what is, can be, or will be), and value (what is good or desirable) assumptions

33 His speech included the Chinese mainland and Taiwan as a whole.

34 Here he was referring to the policy on overseas education for grant and self-funded students.
(20003, p. 55). The existential assumption was that technologically the Chinese nation had lagged behind the rest of the world for a long time and the value assumption was the technological and industrial advancement in Western countries. The propositional assumption was that through advanced and industrial transformation and development, the Chinese nation would rebuild and catch up with the rest of the world, meaning the developed countries. These assumptions featured the discourses on overseas education policy that was typical of that era which was not distant from the 1950s or from the early twentieth century and the split between China and Taiwan. The policy of studying abroad was aimed at reducing the scientific and technological discrepancy between China and the advanced countries, such as the US, France, UK, Germany, and Japan. This discourse obviously was part of the legacy that emerged in the confrontation between the Tsing Dynasty and western imperialism in the early twentieth century. In spite of the fact that the CKS government already lost mainland China it still was committed to returning to China. Accordingly, developing human resources were particularly crucial since they were required for that purpose and for the subsequent reconstruction of the Chinese nation.

Coupled with the minister’s statements of achieving a Chinese nation was the need for state intervention in education to reach that goal. This can be viewed from two different perspectives: the conventional thinking on the state’s role and education as a means for nation building. As an old Chinese saying goes, national resurgence lies in talented people (中興以人才為本). Since the Chinese nation had confronted many difficulties since the advent of Western imperialism in the Tsing Dynasty followed by the civil wars against the Chinese communists, the government’s responsibility in cultivating talented people by sending them for study abroad seemed to become even more urgent. It is this political context that brought all these discourses together, such as overseas education, modernizing human resource through acquisition of
Western technology and industry to defeat the communists and recovering China, and eventually
catching up with the developed world. In brief, it was the context of these assumptions that
compelled the government to use overseas education as a strategy although this discursive
complex had its shortcomings which led to many challenges. From the perspective of the
government at least, the strategy of acquiring and utilizing western technology and industry
could meet its political objectives.

Repeated discourses in public opinions. Additionally, this discursive aspect was
dominant in mainstream society and provoked intense debates not only in government, but also
among the elites. Two books that exemplified these debates and concerns of studying abroad in
relation to the policy measures of the government were Direction of the Contemporary
Generation and the Problem of Studying Abroad (這一代的方向與留學問題, Chen, 1968) and
Overseas Students and Questions of Overseas Education (留學生與留學問題, Duan, 1970). The
former was a series of published essays on the problems of the overseas education policy in the
Central Daily News in late 60s, and the latter was a collection of essays on the same concerns
published in several major magazines\(^35\) that vividly represented the major discourses on the
phenomena of studying abroad.

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\(^{35}\) These included the University Magazine (大學雜誌), Overseas Scholars (海外學人), and
The Eastern Miscellany (東方雜誌). University Magazine was a journal initiated by a group of
young university students in 1979 in which students and intellectuals published their essays on
political, economic, and social issues. The Eastern Miscellany was a first published in China in
the early 1900s and relaunched in Taiwan in the late 1960s. Overseas Scholars was published by
the Ministry of Education and a group of overseas students particularly for overseas scholars and
Several major issues on the overseas education policy that were extensively discussed included the significance of science for the Chinese, the national identity in relation to nationalism, the discrepancy resulting from the brain-drain, and national and social reconstruction. For instance, on the question of the national identity of Chinese students abroad, some suggested the Ministry of Education adjust the policy by requiring students to work for several years which would not only prepare them better but also help familiarize them with Taiwanese society and build up effective networks. These working experiences could enhance the students’ national identity and improve the possibility of their returning to Taiwan. Others believed that national identity was not just a matter of the duration students lived in Taiwan, not to mention that it would be a waste of time since most of them willing to study abroad usually were more persistent. In the same book, there were also discussions about the significance of scientific and industrial development for Taiwan and measures for enhancing the scientific and industrial environment to attract overseas Chinese scholars. In relation to the issue of the brain-drain, there were various suggestions on overcoming the problem although some argued it was arbitrary to claim that all people who went to study abroad were talented. One solution to the brain-drain problem was to initiate “knowledge circulation/reflux (知識內流)”, by which Kao suggested the government invited scholars overseas to contribute their professional knowledge by writing on particular topics interested in the government (Kao, 1968, pp. 138-141).

Additionally, there were also strong criticisms of the many side effects of the overemphasis on overseas education. These included students who were considered lacking ambition and not students to express their works and critiques. Essays and criticisms published in these journals largely reflect the mainstream opinions among social elites.
respected by their peers and families for remaining in Taiwan; men who had been abroad were more appealing to women, overseas students were better regarded even though their credentials might not be good, and the intention of female students in going abroad to “search for better husbands” (Jiang, 1970).

In the book *Overseas Students and Questions of Overseas Education*, similar questions were raised. For instance, the responsibility of overseas Chinese scholars as intellectuals in relation to their national/cultural identity, the brain-drain caused by overseas education, desire for (American) modernity, as well as the limited domestic employment opportunities for higher degree holders. From today’s viewpoint, it is striking to see the strong discursive connection between patriotism, Chinese nationalism, and overseas education, and I would argue that it was the post-war historical era and context that shaped this linkage.

**Overseas studies as opposed to the Chinese cultural renaissance movement.** In addition, another issue raised by an article in this volume took into account the popularity of study abroad as opposed to the *Chinese Cultural Renaissance Movement*. The movement, initiated by Chiang Kai-shek and a group of social elites and intellectuals in 1966, aimed mainly at reviving Chinese culture to resist the *Cultural Revolution Movements* in China (Chinese Encyclopedia Online, 1983). The goal of the Movement, based on Dr Sun Yat-sen’s *Three Principals of the People* briefly discussed in chapter 3, aimed not merely to revive traditional Chinese culture, but to harmonize Chinese culture and Western modernity to take advantage of democracy and freedom without losing traditional and national values. The Movement repeated the values and greatness of Chinese civilization while acknowledging the far superior scientific and technologic development of the Western world. In spite of the fact that the Movement was criticized as a means by the KMT government to control people’s thinking, it is described here
not only in terms of characterizing the socio-cultural milieu but in distinguishing a prevailing
discourse articulating the intermingling of Chinese culture and western modernization, which
included material but also the humanitarian aspects. In terms of the socio-cultural milieu, it
evidenced the impact of ideological struggles between China and Taiwan, as well as the
utilitarian perception of mainstream Taiwan towards the values of Western (primarily American)
modernity.

Although the discussions in the books were not limited to the scholarship program, the
issues nevertheless were taken into account by the government in formulating and regulating the
policies on overseas education including the scholarship program. Both books touched upon
issues such as nationalism being closely linked to scientific attitude and development, not only
for the anti-communist effort but also in regaining national dignity.

**Discourses on the responsibility of overseas education.** These discourses contested the
nature of overseas education as well as the state’s involvement in it. For mainstream society
studying abroad was seen as an indispensable extension of the higher education process.
Generally, mainstream society believed that talented students could not receive appropriate
training locally and that studying abroad provided better educational opportunities, which in
principle should be beneficial to the society as a whole. But the question was how these students
could and should contribute to the nation. Or to phrase it differently: in evaluating overseas
education the contributions of these foreign educated elites were considered significant by
society. From today’s viewpoint, this concern is seemingly irrelevant. However, it may be
argued that simply seeing this as unnecessary or even outdated is in fact to be blinded by a pure
liberal perspective that considers education as an individual or civil right. Only when one
considers this perspective as a discourse and views it as the elites’ contribution to the nation in
international politics, the economy, and socio-cultural discourse, could it be understood how the program was formulated and implemented as an important strategy to respond to this structural complex. At the same time, it shows how discourses, such as Chinese nationalism, the anti-communist effort, as well as western progress, were influenced by the political struggles between China, the US, and Taiwan, commercial considerations and ideological conflicts.

**Contextualizing these discourses in the 1960s.** The strong orientation of the CKS government toward the US can be traced to the pre-World War Two era described in the last chapter. Following up on the close relationship established in the early twentieth century through World War Two, the bond between the US and the Chiang Kai-shek government in Taiwan became even stronger during the Cold War due to their alliance in the wars and their common interest in fighting the communists. As a beneficiary of the Truman Doctrine and a member of the anti-communist bloc, Taiwan received US aid not only for major military and industrial infrastructure projects but also for education. It is undeniable that since the CKS government’s retreat to Taiwan, US financial and military deployment did help Taiwan overcome difficult times. Consequently, Taiwan built up a strong relationship with the US in the military, economic, industrial, cultural, and education fields. Both Taiwan’s dependence on the US and the latter’s leading role in the international community exerted a profound influence and provided persuasive accounts for the advancement of US interests in Taiwan. It was this international context of the early stage of the Cold War that inherently favored the continuation of the scholarship program encouraging eligible Taiwanese to study in the US.

**Debating discourses and the program into the 1970s.** With these discourses in mind it would not be surprising to see them repeated in the 1970s. For instance, the linkages between overseas study and national development, as well as being part of the anti-communist agenda,
were apparent in various government financial documents. The *Annual Fiscal and Budget Plans of the Ministry of Education* from 1969 to 1970 noted that funding for “selecting and supporting elite students to conduct scientific research and learn new knowledge from abroad is to comply with the needs of national development” (Executive Yuan, 1970, p. 65). Eventually, it was hoped that “the national development and advancement plan can assist the anti-communist enterprise and return to Mainland China” (Executive Yuan, 1969, p. 1).

Meanwhile, debates on those issues that prevented this policy from meeting national needs were repeated in nearly every decade. One example was the adequacy of designated fields of specialization. In 1971 some of the scholarship Exam Committee members noted the recurrent issue of the unwillingness of students to return to serve the country. The rapid economic development in Taiwan desperately required large numbers of talented people which was difficult to secure. It was felt that this reflected the mismatch between the designated study subjects of the scholarship program and national needs. The committee members therefore recommended the MOE to conduct a systematic evaluation to ensure that the program’s fields of study would truly reflect national and societal needs (United Daily News, 1971, April 25, p. 2).

Again, this example merely reflected one aspect of the paradoxes inherent in the discourse that covered a whole range of issues that were tied up with nationalism, ideological struggles, as well as the skills and knowledge required for modernizing and sustaining national and social development. It was exactly these paradoxes and the search for a particular form of knowledge that were reflected in discourses through which Taiwan sought to have an appropriate overseas study program strategy. In lay terms, after nearly two decades of the program, issues (resulting from discursive paradoxes caused by nationalism and ideological struggles) challenging the meaning and purpose of the scholarship were raised again in the early 1970’s. In
1973 the Legislative Yuan invited the then education minister to report on the scholarship program. In the report (Legislative Yuan, 1973), the minister stated:

The main purpose of sending students for overseas study is to meet the needs of national development. If the human resources developed through the program/policy cannot meet the national need, then it is pointless to keep the program/policy. Not to mention that there are currently over 34,000\(^{36}\) overseas students with individual specialties. The government could just recruit those overseas students to serve the country and does not need the policy of encouraging students to study abroad...

Our educational policy of overseas study started in 1872 when the Tsing Dynasty sent 120 students to study in the USA and has undergone 101 years... In recent 20 years alone, with many dramatic changes in our society, many students become so proud of studying abroad and swarm for overseas. It has become a trend. If the government continues promoting overseas study, it will then unconsciously foster this trend. Overseas study should be conceived as a supplementary education, by which we could learn others’ advantages to complement our own shortages. Now overseas study has become an extension of formal education. Our university education turns out to be the preparatory education for overseas study. In order to correct this trend, we should seriously consider discontinuing the scholarship program for overseas study...

As a matter of fact, since we started our modern educational system, the ultimate goal is to set up a solid foundation for developing higher education, and to ensure the capability of conducting academic research independently. However, concerning the domestic shortage of human resources and research facilities, as well as the necessity of international educational cooperation, the governmental measures for encouraging outstanding youths to study abroad should be kept in a reasonable manner and require them to return to serve our country. Therefore, our policy should aim for developing our national education and academy, which is facilitated by reasonable measures of guiding students for overseas study...In short the policy for overseas study should take into account the fundamental needs of developing national education and academy. At the same time, it should strike a balance between the economic development of our society and the youths’ individual interests... (pp. 9-11. My emphasis)

\(^{36}\) According to Lin (1976, p. 556), US statistics in the 1970s considered ‘Chinese’ students to include “overseas Chinese students’ from countries such as Hong Kong, Macao, Japan, and probably also from China, thus possibly inflating this figure. This overstated number also reflected the sentiments that mixed up racial identity with national political identity.
In the same report, additional concerns were raised by the Director General of the Bureau of International Educational and Cultural Relations in the MOE, Li Zhong-guei (李鍾桂), who was a scholarship holder in the early 1960s\textsuperscript{37}. Li noted that the program did not cultivate the necessary human resources needed by the nation. Firstly, the fields of study did not necessarily match national development needs. Owing to various factors many grantees switched fields of study when abroad, and even if they did not the social environment could have changed after a five-year study program. Moreover, it was difficult to ensure the grantees could occupy positions that could optimize their contributions to national and social development since some fields of study needed by the nation might not have been fully developed to accommodate the grantees (Ibid, pp.11-13).

This ministry report reveals the many complexities confronting the scholarship program. First, it reaffirmed that the purpose of the program was for national development and modernization. Not unlike the objectives of the Boxer Indemnity Scholarship Program, the resumed program also stressed on the link between national development and western advancement. This emphasis was apparent in the way the minister traced the program to the Rong Hong Project and clearly articulated the significance of “learning others’ advantages to complement our own shortages.”

Furthermore, the sending of students overseas was ultimately targeted at establishing the foundations for independent education and academic development in Taiwan. This emphasis,

\textsuperscript{37} As a scholarship grantee in 1961, Li (1938- ) received her doctorate in France. Like most scholarship grantees then, she was sought for the faculty of a leading university upon her return to Taiwan and soon after invited to join the government. She became the Director General of the Bureau of International Educational and Cultural at the age of thirty-two.
again, implied a need for imitating Western modern education and scientific developments. Although policymakers hoped that ultimately this imitation would end someday, what they could not determine was the extent to which Taiwan should follow the West to be independent. As noted by postcolonial critics, there will never be perfection in replicating and transferring western values to others. Nevertheless, the struggles reflected in the report clearly showed a situation where agencies were not only conditioned by but also attempted to adjust the structure.

All these concerns also led to policy initiatives aimed at replacing the historic scholarship program with one that could deal with these thorny issues. At the end of 1973 all three major newspapers reported that the MOE was considering discontinuing the program in 1974 and replacing it with a new fellowship program (China Times, 1973, April 6, p. 2; United Daily News, 1973, Nov. 20, p. 2). The new program would select grantees through their research proposals or statements of study plans and applicants must be outstanding students from low socio-economic status families. The designated fields of study should be relevant to national development, or such fields for which fellowships were not offered by foreign universities, or were newly emerging fields in overseas universities. Better terms of contract would be offered to the students with the proviso that they return to serve the nation.

In any event, this new program did not replace the original scholarship program as public opinion especially among those opposed to terminating the old program believed that both program would have their respective defects. They argued instead that the MOE should address the flaws of the existing program, rather than simply replacing it. In particular, the prestigious scholarship program provided good motivation for outstanding students. The inherent problems of the scholarship program could not be resolved by replacing it with a new program, especially
since it would be difficult to determine the criteria for “low social economic status” (United Daily News, 1973, Dec. 6, p. 6).

In the end, the new fellowship program was not launched despite the fact that the original was acknowledged to have many problems, and the major one being the low percentage of grantees returning to Taiwan. For instance, of the 141 grantees between 1955 and 1973, 66 were supposed to return to Taiwan but only 33 did. Inevitably, the scholarship program was criticized as encouraging the brain drain. Owing to its prestige and ability to motivate outstanding students it could not be easily cancelled. In addition, the newly designed program could not convince the public as it was unable to propose a persuasive “standard of defining outstanding students from low social economic status.” In other words, the methods and criteria of selecting grantees for the new fellowship were not considered neutral and convincing (United Daily News, 1973a & 1973b, Dec. 30, p. 2). Based on this, the MOE decided to continue with the original scholarship program.

**Chinese nationalism, economic commitment, and anti-communism by 1975.** This section will depict the multiple contexts confronting Taiwan that allows one to see the complexity in which the scholarship program operated. To a large extent, political tensions between China and Taiwan and economic conditions remained fairly similar to the previous stage, while at the same time the CKS-government, in line with the advice by US economists of getting the economy ready for “take-off,” began undertaking a series of economic and financial policy measures to wean off US aid which was slowly being withdrawn beginning in 1965.

In fact, the economic foundations laid down in this period provided the basis for Taiwan’s so-called economic miracle in the following decades. This period consisted of two of Taiwan’s three-stage economic policy, that is, *Import Substitution* (1950-1958), *The Emergence
of External Orientation (1958-1963), and Continuous External Orientation Phase (1963-1982) which were major economic policy orientations (Li, 1995). Together with the launching of several economic policy measures to attract investments for example the Act of Encouragement of Investment (Encyclopedia of Taiwan, 2011a), this period also saw the establishment of several export processing zones (Ibid; Encyclopedia of Taiwan, 2011b).

Moreover, this policy was further supported by plans to step up the development of human resource in Taiwan. Ironically, a review of the program again revealed American involvement as the manpower plan was first initiated by Harry Weiss, the US Secretary of Labor, during his visit to Taiwan in 1963 (Li, 1995). Weiss suggested assigning this task to the newly restructured Council for International Economic Cooperation and Development which was the successor of the Council for U.S. Aid38 established in 1948 and predecessor of today’s Council for Economic Planning and Development in Taiwan. The Council presented the first and subsequent national manpower development plans that became integral parts of the economic plans. In brief, these plans for economic purposes promoted vocational education at the associate

38 Interestingly, even as American aid ceased in 1961, the Council for U.S. Aid continued until 1963 as it was re-formed as the Council for International Economic Cooperation and Development. This Council played a critical role in developing, integrating, and coordinating across ministerial policies. This Council eventually was transformed to the current Council of Economic Planning and Development that is charged with economic policy of Taiwan’s development (The Council for Economic Planning and Development, 2011). For instance, in an interview with a policy maker, Dr. G, he mentioned that representatives from the Council were also invited to annual committees and to suggest designated fields of research for the scholarship exam.
degree level in the 1960s and 70s and later on scientific education at university and post-higher education level since the late 1970s (Li, 1995). At first glance, tracing the economic context again seems to highlight the significance of US aid. Nevertheless, as Chu (2009) argued not all recipients of American aid transformed their economies as Taiwan did. From the perspective of economic development, Chu pointed to the paradoxical role of Chinese nationalism and a group of Chinese intellectuals in the development effort. Chu (2009) noted:

Developing economies need to have strong active forces to promote development, usually motivated by nationalism to fend off foreign economic dominance. Taiwan’s post war development was promoted by the Nationalist government, and its motivation came from the Chinese nationalism forged during the century-long Chinese struggle against foreign imperialism since the Opium War. (ibid, p. 51)

Chu pointed out that a crucial factor contributing to Taiwan’s economic miracle was the nationalism of a group of intellectuals who promoted the use of Western science and industry to save the Chinese nation (以實業救國的儒官) from Western imperialism and colonialism. In the case of Taiwan’s economic development, Chu, quoting insights from Amesden (2001), asserts that developing countries’ nationalism must be promoted to counter the political-economic power of Western imperialism, so that they could consolidate power against the West. Chu’s argument sheds light on understanding another form of resistance, which did not have to be antagonistic but in an integrative strategic way by developing respective niche economies in the international economy. Although in post-colonial studies, nationalism belongs to a problematic discourse that was complicit with imperialism and colonialism and needs to be unpacked, Chu’s argument of emphasizing nationalism and the role of Chinese intellectuals provides a strategic perspective shedding lights on the discussion not only on the link between the scholarship program and Taiwan’s confined state in the 1960s and mid-1970s, but also on the inherently powerful role of scholarship fellows in forming national policies in this era, as reviewed below.
Envisaging Taiwan as a blank paper to draw upon. After reviewing the many statements and relevant literature on the program, it would be appropriate to evaluate the roles and experiences of scholarship fellows. I will firstly discuss Li Kuo-ting who is described as the Godfather of Technology of Taiwan in recognition of his vision and contribution in initiating and planning the technological and industry parks (e.g., Hsin-chu Industrial Park that successfully linked with Silicon Valley) as well as proposing the three-stages of the economic plans. Also included will be the accounts of two fellows who studied abroad during this period. Although their experiences differed from Li’s, their accounts reflect a time when Taiwan was viewed by Chinese intellectuals as a blank sheet of paper on which they could blueprint the strategy in the anti-communist agenda and for Chinese nationalism. This was made more complex by the discursive differences between being Chinese and Taiwanese as reflected in the local Taiwanese’s narratives about his career experiences.

Li was a fellow of the Boxer Indemnity Scholarship Program in Britain. After returning from Cambridge in 1937, he was employed as a physics professor in China. In 1948 he came to Taiwan for a managerial appointment in a shipbuilding factory and was later given a series of important government appointments in charge of developing industrial and economic projects between 1960 and 1970. He was also the Secretary of the Council for U.S. Aid (美援運用委員會). Later, he was appointed Economic Minister, Treasury Minister, and Chair of National Science Council, etc. Credited as one of the two major figures who crafted Taiwan’s economic miracle and laid the foundation for Taiwan’s technological development, Li’s influence on technological

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39 The other was Sun Yun-suan (孫運璿). Interestingly, Sun was also a student with quasi-overseas education. He went to a high school for Russian immigrants in China and college of industry and technology co-funded by Russian and Chinese educators.
and financial policies in Taiwan was profound until late 1980s. His major contribution to the nation’s economic as well as technological development was in his skillful management that combined US aid policy and the three stages of economic policy (including establishing export processing zones between 1960 to 1970s and industrial parks in the 1980s), and in advocating several key technologies for Taiwan to focus on (Academia SINICA, 2011).

Li articulated that based on Dr. Sun Yat-sen’s *Three Principles of the People*, Taiwan’s economic policy “sought to achieve a balance between market forces and planning, fostering the more desirable aspects of capitalism while avoiding its excess” (Li, 1995, p. xiii). This balancing approach between a free-market economy and a planning economy usually was conceptualized as the Developmental State model commonly adopted in East Asia. Although this concept largely reflected an economic logic in relation to the state’s role, it overlooked, at least for Taiwan’s case, the international confining structure and the role of agency. These experiences and narratives of two scholarship recipients presented below might not directly explicate the higher cause of the anti-communist enterprise for national and social development, but they reflect how their involvement was indirectly associated with the anti-communist effort. Moreover, their narratives also mirrored some implicit tensions of Chinese nationalism as opposed to that of local Taiwanese.

**Local Taiwanese fellows.** Both Dr A and Dr B studied different sub-fields in education in Europe in the mid-1960s and the US in the early 1970s respectively. Both of them were from southern Taiwan where public education resources were limited. According to them, it would have been impossible for them to have studied abroad without financial assistance particularly in that era and the scholarship dramatically changed their lives in many ways. Their mobility was a crucial factor of this financial support. While Dr A could not return to Taiwan during his four-
year-study even for his father’s funeral as he could not afford the flight ticket, Dr B mentioned his American professor joked that his three-year absence from his wife and children were sufficient grounds for divorce. With their limited personal finances they did not return to Taiwan even once. Moreover, as Dr B noted, the monthly living stipend of the scholarship program was even quadruple as his salary of university lecturer in Taiwan (Interview with Dr. B, Jan 11, 2011). Both accounts reflect not only their challenging socio-economic status, but also the general environment of Taiwan when agriculture was the mainstay of the economy. Although Japanese colonization in Taiwan initiated a systematic endeavor at modernization, it was mainly for colonial Japan’s domestic interests and large-scale industrialization was disregarded (Chu, 2009).

Their experience with the program improved their understanding of their host countries. While Dr B mentioned that his study in the US helped him understand “American advancement and academic cultures” (Interview with Dr B, Jan, 11, 2011), Dr A mentioned that his European experience provided him the resources for teaching and practicing during his high-ranking government appointment in education although “the European experience could not be completely transplanted in Taiwan” (Interview with Dr A, June 8, 2010).

In addition, the scholarship largely served as their career stepping stones. They were already Master-degree holders and lecturers at leading universities before even sitting for their overseas scholarship qualifying exams. According to them, doctoral degree holders from leading foreign universities were in so short supply that they were invited for associate professorship positions by their universities even before their return to Taiwan. Both of them played critical roles in shaping the foundation for the later development of education through their positions at the universities and their publications. Their writings mostly reflected academic trends in their
fields in European countries and in the US at that time and have been widely designated as educational canons (for generations like mine). Accordingly, their profound influence on Taiwan’s academic development was in no doubt. Furthermore, after several years teaching they were rapidly promoted and soon invited to join the government to help with policy design, formulation, and implementation. Included in their portfolios was consultancy for the scholarship program.

Despite the fact that the detailed mechanism for scholarship program remained to be discussed both recommended continuing it for different reasons. For Dr A the program was worthy recognition for excellent students while Dr B appreciated it for its ability to help uplift students from low socio-economic backgrounds and improve their upward social mobility.

In terms of facilitating national and social development, Dr A noted the “symbolic meaning of the scholarship program” which designated fields of studies and selected only one fellow for each field as a means of indexing the development of the nation. Dr B on the other hand, believed that the scholarship’s impact on the modernization and development of Taiwan was evidenced through the way many fellows were involved in the formulation of national policies and their commitment and contribution to academia. Although they differed on how the scholarship contributed, the discursive articulation of the significance of the scholarship program was obvious. In other words, irrespective of the quantitative dimensions or the symbolic significance, their discursive effect on the role of the scholarship was profound.

Coincidently, they were both so-called local Taiwanese, as opposed to the elites and officials, such as Li Kuo-ting, who came along with the CKS regime to Taiwan. In response to questions about the impact of the scholarship on him, one of Dr A’s accounts revealed a complex
historical, political, and social context in which the scholarship fellows from the local Taiwanese local would be chosen. In his words,

It (my career) could not completely attribute to the scholarship program. Neither could you say that I am extremely excellent. It was rather because there were not many qualified people. For instance, at that time president of the xx University\textsuperscript{40} was found not through election (of faculty members) but through appointment (of the government). At that time the Ministry of Education suggested three candidates for the Minister to choose. Two of them were deans at the University, and the third one was I. I was just a chair and the other two were actually my professors. But because I was young and happened to be a Taiwanese local, they meant to opt for people from the local. At the time Mr. Chiang Ching-kuo, the president of the Executive Yuan\textsuperscript{41} and later on the president, meant to cultivate local elites. This tendency was jokingly called “Tsui Tai-Ching\textsuperscript{42} (催台青)”…Principally they wanted to start to cultivate political elites from the local. For instance, as I was appointed as the xxx (A leading position at a Ministry of Taiwan), most of other cabinet members were like xxx, xxx\textsuperscript{43}…etc. It was an unspoken policy meant to gradually train some local “elites” – in a better name as “elites”, actually young generation from Taiwanese local with qualification such as advanced degrees. So we were right in this tide. The scholarship program could be one factor that paved my way by shortening my time of overseas study…It seemed to be serendipitous. (Interview with Dr A, on June 8, 2010)

This narrative adequately describes the historical context in which Dr A, among the many local Taiwanese, was situated at that time. Between 1960 and 1975 the CKS government cultivated talented people, in particular local Taiwanese, not only for the anti-communist enterprise but also for developing new generations of technocrats in the government. Since the CKS government

\textsuperscript{40} A leading university in Taiwan where he worked as Chair of a graduate institute, the academic provost, and president.

\textsuperscript{41} The Executive Yuan is like US State Department.

\textsuperscript{42} Tsui was a very famous pop star at the time. This name is homonymic with the meaning of “catalyzing Taiwanese youth”.

\textsuperscript{43} Other cabinet members were either social elite who came from China with the KMT government or were the second generation of these social elites at that time.
operated among 1.3 million immigrants (12.5% of the total population) who came from the Chinese mainland in 1949 (Government Information Office, 2010), the need to develop a new generation of human resources for the purposes of the CKS government became increasingly urgent.

In fact, one phenomenal program that could best exemplify cultivating the talents via overseas studies for the objectives of governing Taiwan and the anti-communist enterprise was the Dr. Sun Yat-sen Fellowship Program for Overseas Studies established by the Chinese Nationalist Party (KMT) in 1960. According to Dr. C (interviewed in the next section), this KMT fellowship was more prestigious than the MOE scholarship at that time. The Fellowship not only provided great financial support but also represented the cornerstone for a promising career since the KMT was the only party dominating the government. Indeed, the list of recipients comprised many political luminaries. In addition to a number of political celebrities in Taiwan, the current president, Ma Ying-Jeou (馬英九), was also sponsored by this fellowship program for his master’s degree from the United States.

In brief, in spite of the small number of scholarship fellows in this era, their influence on Taiwan was profound. The documents on Li Kuo-ting and the narratives of Dr. A and Dr. B provided important accounts of their national development modernization programs in policy papers and in their individual practices. Following the generation of the Boxer Indemnity Scholarship students locating to Taiwan, this later generation formed the top echelons of policy makers who assisted with formulating and implementing national development policies. They, and in particular the local Taiwanese, were considered pioneers and planners for the following generation. Their personal motivations for pursuing an overseas education and working with government and academia might not directly conform to the anti-communist agenda of the
government. Nevertheless, their education overseas not only enabled them to understand the other and adopting relevant strategies into policy formulation, but also strengthened their invisible connection (such as personal and institutional) with the West. Both factors made the scholarship program a kind of strategy for modernization that differed from the US and European models, which Taiwan could borrow from and speak with.

1976-1990: Diversified Program: Economic, Key Technological and Scientific Development

Although there was debate on replacing the scholarship program with a new fellowship in 1973, it continued to grow after plans for the latter were aborted. The changes in this stage of the program were as drastic as the social events unfolding during this period. While the overall overseas education policy became more diversified, not only in terms of statements and practices, but also in the development of areas such as providing better incentives for foreign degree holders to return to Taiwan, the overarching discourse of modernizing and developing the nation and society by learning from advanced countries remained constant. From the late 1980s, under the overarching discourse of national and social development was an emphasis on economic and key technological and scientific development, together with striving for market liberalization and political democratization.

Discourse on overseas education in national and social development. In discussing discourse, Fairclough pointed to the significance of identifying “how particulars come to be represented as universals – how particular identities, interests, representations come under certain conditions to be claimed as universal” (2003, p. 41). Applying this concept to this research allows one to see that through the institutionalization of the scholarship program, the discourse of studying abroad and connecting with Western advancement and national development became universal and normalized. Based on the Public Bulletins of the MOE
between 1975 to 1990, the scholarship program can be classified into three categories: the various regulations governing overseas education, annual scholarship exam announcements, lists of successful candidates and their countries of study, and the requirement for students to return to Taiwan. The objectives of the program were considered obvious and as such were only given a cursory mention in official documents. For instance, in the 1976 version of the Rules of Overseas Studies (國外留學規程), the first article explicitly stated that, “In order to meet [the] needs of national construction and academic research and development, the Ministry of Education legislates these rules for all affairs regarding overseas studies” (MOE, 1976a). Similarly, some research briefly notes the scholarship program’s purpose was to “cultivate advanced human resources for national construction and development” (Research Committee for National Development, 1975) or, even more vaguely, to respond to “public opinions” (Lin, 1976, p. 534). By and large these statements echo the dominant discourse linking overseas education with national and social development inherited from the earlier stage, although simultaneously discursive diversification trend was emerging under the overarching discourse.

One could enquire as to the meaning of the national and social development discourse during this era such as whether it continued having statements on the anti-communist enterprise. Before elaborating on how the discursive shifts and expansion were manifested and still connected to the idea of national and social development, some contexts will be provided, since

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44 The first issue of the Public Bulletin of the Ministry of Education of the Taiwan-based CKS government was published in 1975. Up to CKS’s death in 1975, most policy decisions were made directly by the President’s Office and often announced as presidential orders without any elaboration.
the expansion of the scholarship program occurred in an environment of strong economic growth and political crises in Taiwan.

**Contextualizing the scholarship program between 1976 and 1990.** In terms of economic growth following the oil crisis in 1973, the Prime Minister Chiang Ching-kuo who succeeded as President after his father's death in 1975, initiated the *Ten Major Construction Projects*\(^{45}\) between 1974 and 1979 aimed at infrastructure development. Historians and economists are divided on the significance of these projects. Nevertheless, it was generally recognized that they played a crucial role in job creation as well as laid the foundation for the next phase of rapid economic and industrial development in the 1980s and early 1990s. As noted earlier, the rapid economic growth represented what was widely regarded as the era of Taiwan’s economic miracle. In addition, the other major economic shift was the large-scale effort at identifying and developing key technologies thought to be of significance to Taiwan.

As for achieving key scientific and technological development, Saxenian (2006), in distinguishing the trend from *Brain Drain* to *Brain Circulation*, illustrates how a group of Silicon Valley high-tech Taiwanese engineers used their knowledge and experiences to transform Taiwan into a major global technological powerhouse and strengthen connections with the Silicon Valley in the 1970s. She termed this group as *New Argonauts* and the phenomena as *Brain Circulation*. She describes an environment “that encouraged the eventual return of many

\(^{45}\) The ten projects included the construction of a national highway, electrification projects, improving and upgrading the railway on the west coast of Taiwan, the railway project linking the western line and the east coast, Chiang Kai-shek International Airport, two major international ports, three heavy industrial factory projects, an oil refinery and industrial park, and the first nuclear power plant.
of its overseas engineers” (p. 134) and how critical economic policymakers such as Li [Lee] Kuo-ting and Sun Yun-suan (see footnote 38) identified and introduced those key sciences and technologies by working with these New Argonauts (pp. 135-144). Although Saxenian’s illustration portrayed the multiple dimensions involved in this transnational brain-circulation in the field of technology that transformed Taiwan, her major interest was in this high-tech elite and the effects brought about by their mobilization. Less addressed were the educational policies and cultural discourses that formed part of the scenario. At a minimum, this economic transformation should be understood in terms of the other political incidents and events occurring at that time.

In 1971 the CKS government was taken by surprise at the withdrawal of Taiwan’s membership in the United Nations and its replacement with Communist China. Adding to the crisis was the break in official diplomatic relations between the US and Taiwan in 1978 although in 1979 the American Congress passed the *Taiwan Relation Act* replacing the *Sino-American Mutual Defense Treaty* signed in 1954 that provided US military support in ensuring peace between China and Taiwan and maintaining US-Taiwan relationship at a semi-official level. These events had a strong effect on the political, economic, and social life of Taiwan and caused considerable anxiety as Taiwan lost the support of the international community especially that of the US. Such conditions exacerbated emigration and hastened the brain drain.

At the same time, anti-KMT activities started taking place within and outside Taiwan especially after the late 1970s. Notable was the *Formosa or Kaohsiung Incident* in 1979, a large-scale systematic anti-KMT movement agitating for genuine democracy and freedom in Taiwan. Abroad, anti-CKS government and pro Taiwan independence movements flourished although the CKS government’s control was never in danger of being undermined. A major political event
was the death of Dr Chen Wen-cheng⁴⁶. These incidents were followed by the lifting of martial
law in Taiwan in 1987, which resulted in further deregulation, such as relaxing foreign exchange
controls, allowing investments in foreign countries, visits (mostly the immigrants who came
along with the CKS government to Taiwan in 1949) to relatives in China, as well as enhancing
international business with East European countries (Encyclopedia of Taiwan, 2010). In brief,
overall economic conditions from the mid-1970s up to the early 1990s were more liberal and
open after the series of international setbacks that gradually marginalized Taiwan. Growing
international trade also strengthened Taiwan’s links with the world especially with the US and
western European countries.

These domestic and international political events were more complex than described
above and by no means imply they had a direct effect on changes to the scholarship program.
However the description places the scholarship program in contexts allowing one to see the
prevailing discourses during that era and how they permeated into and influenced the overseas
education program. It is in this context that the scholarship program developed within the
broader overarching discourse of linking national and social development with acquiring

⁴⁶ Chen Wen-chen was a Taiwan-born statistic professor at Carnegie-Mellon University. He
was found dead on the campus of the National Taiwan University during a visit to his family.
Since he was a naturalized US citizen and an active supporter of independence for Taiwan, it was
generally believed that he was murdered by KMT security agents. Owing to his American
nationality, the US House Foreign Affairs Subcommittee on Asian and Pacific Affairs, Human
Rights and International Organizations organized hearings on “Taiwan Agents in America and
the Death of Professor Wen-chen Chen” (Congress Research Service, 2010).
Western progress. I shall begin with exploring the major changes of the overseas education policy and follow with a discussion on the resulting discursive changes.

**Major overseas education policy changes and the scholarship.** The first of major policy changes on the overseas education policy was on the eventual termination of the *Rules of Overseas Study* (國外留學規程). The second was the amendment to the regulation enhancing incentives for foreign degree holders to return to Taiwan. As noted in the earlier section, the government launched the *Rules of Overseas Study* in 1944 as a general guideline for students going abroad. Between 1955 and 1975, self-funded overseas students were required to sit for an annual central exam administered by the MOE. From 1976 (MOE, 1976a; 1976b), this was no longer a requirement but students’ applications had to include evidence such as offers of admission at approved foreign universities, foreign language credentials, and college diplomas before approval could be granted by the MOE. The *Rules* were amended twice before being eventually abolished in 1990 (MOE, 1990).

The amendments to the *Rules* mirrored the inherent issues on the state’s involvement in the overseas education program. In fact, these amendments toward more liberal and freer movement were also influenced by a predominant discourse on greater freedom and democracy. For instance, the amendment in 1987 allowed senior high school graduates to go overseas. This relaxation generated debate in Congress where lawmakers for this change argued that the government had been committed to “deregulation and political liberty” and should therefore give students another channel for college education. In particular, liberalization and internationalization had become powerful trends and Taiwan needed talented people competent in foreign languages. Such relaxation of the conditions would help foster what these students needed and also reduce the pressures caused by the extremely competitive entrance exam as well.
as overcome other problems such as the Little Overseas Students (小留學生)\textsuperscript{47} (Legislative Yuan, 1987a, p. 67; 1987b, p. 205). Lawmakers opposed to this restriction, however, regarded it as ignoring the cultural and scientific progress made in Taiwan (Legislative Yuan, 1987, p. 75). Moreover, some lawmakers, while agreeing with the idea of relaxing restrictions and allowing high school graduates to study abroad, expressed concerns over the overseas influence of communist China. The communists were constantly seeking to recruit high school graduates (Legislative Yuan, 1988a, p. 54; 1988b, pp. 80-81) especially among the impressionable young students who could be easily swayed to the communist agenda if not checked by proper rules and regulations (Legislative Yuan, 1987, p. 85).

From these concerns, from the mid-1970s until the late 1980s the China factor was always in the background, although the interaction between the two parties shifted from the directly antagonistic to jockeying for dominance in international politics and trade issues. Students bound for overseas study especially figured in this struggle. This concern was manifested in discussions at government seminars for students before they went abroad. According to the Rules of Overseas Study, students were required to attend these seminars as one of the prerequisites for any application to study overseas. The compulsory nature and the program of the seminars were also challenged by members of the opposition in forcing students to participate and requiring it.

\textsuperscript{47} Since late 1970s there was an immigrant trend in Taiwan that many rich parents took their children, in the name of traveling or visiting relatives, to the US. Some of these children migrated in at a very young age to apply for identity cards/passports. Once these children reached to a certain age in the US, they confronted all different kinds of problems caused by no ID. There were also a series of disputes in the Congress on how to overcome these problems (e.g. Legislative Yuan, 1985a, p. 48; 1985b, pp. 78-79; 1986a, pp. 169-170; 1986b, p. 78).
to be organized by an agency of the KMT. Moreover, much of the program’s curriculum was thought to be aimed at channeling people’s thoughts through embedding the KMT ideology and interests. These legislators requested the administration to reorganize the curriculum by including practical and appropriate information needed for studying abroad (Legislative Yuan, 1988c, pp. 29-30). The authorities responded that the program was to inform students what services were available and that organizations provided assistances before and during their overseas study and as such the program did not promote any particular ideology (Legislative Yuan, 1988d, pp. 141-142).

Although the relaxation of restrictions on self-funded study abroad are not the major research questions, a brief illustration of these debates allows one to see various discursive elements, such as de-regulation for more liberty, democracy as anti-KMT-authority, as well as the on-going anti-communism effort. This was despite the fact that the antagonism between China and Taiwan seemed to transform from struggling to gain international recognition to one where Taiwan’s robust economic development had enhanced its international linkages and influence.

In addition to relaxing restriction for overseas studies, the government was also committed to enhancing incentives to encourage overseas students to return to Taiwan. For instance, the original Regulations Governing Overseas Students Returning to Taiwan for Service (教育部輔導國外留學生回國服務辦法) by the MOE was abolished and replaced with the Guideline for Overseas Students to Return to Taiwan for Service (留學生回國服務實施要點) by the National Youth Committee (MOE, 1975a). Notably, the first item of this guideline was still to “meet the need of national construction.” This new guideline enhanced incentives attracting overseas students to return to Taiwan. For instance, it not only relaxed the definition of
“overseas students” to include subsidized groups, but also increased allocations for items such as airfares for returning family members and short-term living and accommodation stipends in Taiwan. Moreover, for those interested in operating their own businesses, the government would assist with funding and other information. Those keen on government positions would receive help to find positions in various government departments although in normal circumstances civil servants needed to sit for national exam and go for training before being officially appointed (MOE, 1975b). In addition to this guideline, the MOE formulated the Plan for Inviting Overseas Scholars Returning to Teach (擴大延攬海外學人回國任教, MOE, 1975c) that provided substantial incentives to Chinese scholars to teach at public/leading universities in Taiwan. The increase in their numbers was regarded as a significant achievement, since the MOE Public Bulletin carried regular reports on the numbers of returning overseas scholars and students who had been subsidized (MOE, 1979; 1981a; 1984a).

Despite these efforts, the brain drain and the high percentage of grantees who did not return to Taiwan remained major critical issues raised repeatedly at various fora since 1982 (United Daily, 1982, May 1, p. 2). In 1984, noting the low rate of returning overseas-degree students, the Control Yuan recommended the National Youth Commission take the lead in proposing a series of measures encouraging them to return through, for instance, improving the working environment and establishing a recruiting system (Control Yuan, 1984, p. 284). In 1987 a lawmaker questioned the education administration during a parliament session about the issue of graduates with advanced degrees remaining in the United States (Legislative Yuan, 1987, pp. 74-75) while the lack of such talented people to contribute to national development had been a problem facing Taiwan for a long time. This lawmaker believed that this scenario indicated a “mismatch between education and national development.” Since talented people were vitally
needed for national and social development, he suggested the Executive Yuan take measures to solve this problem such as providing positions to entice them to return. Furthermore, he suggested that the government should establish special offices overseas to manage Taiwanese students by keeping close contact with them and assisting them with job arrangements upon their return to Taiwan.

Such adjustments to different policy measures reflected the government’s strategy to meet the needs of national and social development and were rarely stated explicitly. These measures not only relaxed conditions for overseas study but also strengthened various incentives to induce those going abroad to return. Among the incentives provided by the government was additional assistance in job-hunting, financing for entrepreneurs, as well as special consideration for joining the government service.

**Drastic discursive expansion and transformations of the program.** Situating the scholarship program in this general trend as well as the broader political and economic contexts allows one to sense the many discursive shifts of the program in comparison with the ones in the earlier stages. While national and social development was still the primary goal of the overseas education program its constant adjusting mirrored not only the ever-changing environment but also the positioning of the program *per se* in that era. Briefly speaking, the adjustments to the program included increasing different categories for exam takers with advanced degrees, for educational administrators conducting short-term research, for fields of technologies, as well as for studying in (West) European countries, although the concerns with the brain drain still plagued the scholarship program as well as the general policy of overseas studies. From a discursive analytical perspective, one could argue that these constant shifts were in fact a kind of dynamism interacted by many different discourses driven by various political, economic, and
cultural forces. These forced Taiwan to take different strategies in connecting with Western countries by developing its own economic power and technological/scientific niches in the nexus.

First of all, in comparison with the previous stage, the program was significantly expanded in numbers and groups of grantees. In 1976 the scholarship program selected over 100 grantees\textsuperscript{48} to meet the “current national economic development” (United Daily, 1975, Nov. 8, p. 2; Central Daily, 1975a, Nov. 29, p. 4; 1975b, Dec. 2, p. 4; United Daily, 1976a, Feb. 7, p. 2; 1976b, Feb. 26, p. 2; 1976c, Mar. 14, & 1978, April 16, p. 2). The higher quota was to accommodate the two new categories of educational administrators and graduate students. Originally, the scholarship exam was only for candidates with college degrees. In the extended program, in addition to the increase in the number to fifty grantees for college graduates, two categories were added, one for forty graduate students and the other for ten grantees from the education administration. Candidates from these two categories could take the exam only through the recommendation of their affiliated graduate schools or institutions (The United Daily News, 1976, April 13, p. 2; July 10, p.2). According to the MOE, the doctoral studies were primarily for acquiring research methodology and data collection (United Daily News, 1976, Feb. 26, p. 2 & March, 20, p. 2). The financial support for the two categories was between 6 months to one year. The expanded program lasted for three years (1976 - 1978) providing two scholarship categories for college graduates and doctoral students or for post-doctoral research (China Times, 1979, May, 12, p. 2). The category for educational administrators was discontinued based on its potential overlap with the short-term overseas in-service-training

\textsuperscript{48} Eventually a smaller number was selected for the program.
program for public servants (United Daily News, 1978, Dec. 22, p. 2). From 1979 until 1982, the scholarship program was confined to only college graduates and post-doctoral research.

Interestingly, although technology and science had always been the focus of the program, from 1983 the MOE included the additional category of “key technologies and sciences” (重点科技專案公費) (United Daily, 1983, Feb, 8, p. 2; MOE, 1983), while the composition of the original designated fields was increased to half of the total disciplines (United Daily, 1983, May, 5; Sep, 16, p. 2; United Daily, 1984, April 10, p. 2). This was in line with the strategic plan of the three-economic-stages that stressed the importance of developing key technologies and science for Taiwan. For instance, from 1975 the MOE proposed a four-year plan to develop science education (MOE, 1975d). At a workshop for elementary school teachers in 1981 the Prime Minister Sun Yuan-suan (see footnote 39) mentioned that “the educational goal of Taiwan in the 1980s was to develop scientific education and to honor our traditional culture, for both of which elementary education was integral” (MOE, 1981b). Therefore, “elementary teachers should take on the historical responsibility of our nation to educate our next generation to achieve the goals of the anti-communist enterprise and unify China with the Three Principles of People’s Livelihood” (ibid).

In addition, from 1984, in line with the recommendations of the consulting committee for the scholarship program, the MOE used a portion of the budget allocated for college graduates to create a category that supported 10 master’s degree holders’ studies specifically in Europe (MOE, 1984b). The rationale for adding this category was to counter the large number of students studying and remaining in the US. To overcome the brain-drain to the US the MOE designated scholarship fellows to study in Europe, quoted the United Daily News from a meeting
decision from the MOE (United Daily, 1982, May 1, p. 2; United Daily, 1982, May 16, p. 2). This category for master’s degree study in Europe continued to be expanded until 1990.

According to the MOE, the expanded scholarship program was aimed at encouraging talented candidates from different fields to participate in the program as there was increasing concern at the decline in the number of exam takers and their average scores. This situation was interpreted to mean that fewer students were interested in the program although easier self-funding (Central Daily News, 1977, Oct. 14, p. 4) and the generally improved economic situation allowed more students to go abroad without government support (China Times, 1981, Oct 17, p. 2). Despite the increasing numbers of self-funded students there was general agreement that the national scholarship program was still needed because “local academia still could not develop independently, in particular in technological development” (Central Daily News, 1977, Oct, 14, p. 4).

Since its expansion in 1976, the scholarship program experienced a series of discursive and practical shifts as the contexts required. The many adjustments to the numbers of students and categories of recipients, diversification in host countries (from the US to the Europe), and the emphasis on key technologies and science as manifested in the designation of research fields reflected these shifts. Nevertheless, these shifts in the overseas education policy reveal the trends towards a general deregulation and liberalization of the political and economic environment beginning in the late 1980s, which in turn led to greater global mobility and flexibility in the next decade. Nevertheless, these discursive shifts should not be simply regarded as a naturally evolving path. Rather, they were the result of historical contingencies emanating from political and economic considerations and events.
Fellows’ experiences: Ambiguity or affirmation? Dr C and Dr D studied abroad in the US during this era. Both addressed the significance of the program in terms of public funding, sense of mission, as well as promoting career development. In the context of the status accorded by the program and the opportunity for academic and cultural development, while Dr D viewed them positively, Dr C believed she was just fortunate to have received the scholarship and her experiences of American academic culture were picked up gradually.

As the only female of the five interviewees, Dr. C’s master’s degree was from a leading private university on the west coast of the US. Being a professor specializing in qualitative methodology, her accounts are more complex that mixed her experiences in the early 1980s with her reflections on them. Echoing other scholarship fellows, she cited the impossibility of studying abroad on her own resources. She recalled the generous nature of the scholarship which included a round-trip business-class flight ticket, full tuition, and a stipend that even allowed her to send money home. She recalled that although the university she joined was not her first priority she was persuaded by her mentor (a scholarship fellow from an earlier group) to study there because “I should go to the most top one due to the unlimited financial support by the scholarship” (Interview with Dr C, July 10, 2010). Similarly, Dr D studied science in the United States in late 1980’s and like his predecessors he mentioned the challenge and impossibility of a student from a farming family in middle Taiwan being educated abroad. Prior to getting the scholarship, he had taught for a few years at a senior high school and was already married with a young family. Without the support of the scholarship “I probably would still merely just have been a high school teacher” (Interview with Dr D, Jan, 10, 2011).

Dr C’s experience at the campus also was more varied compared to others from different generations. She noted that owing to the academic freedom prevalent in the US west coast she
could experience strong student activist trends. In particular, since her school was one of the few in the US having significant amounts of research resources on China/Taiwan (which were unavailable in the two places) and Asian studies, many Taiwanese anti-CKS-regime scholars and pro Taiwan independence activists were present. She explained that it was a period of great uncertainty and unrest. She attended student demonstration when the US had just broken off diplomatic relations with Taiwan in 1978. In addition to the tension during the Formosa Incident in 1979, she also sensed the unease in her campus after Dr Chen Wen-chen’s death. She mentioned that there seemed to be a lot of confusion going on not only in terms of personal goals for study abroad, but also for the broader question of her own identity. For example, she said that “there were also Chinese neighbors from the Mainland, and she didn’t really know if she could also refer to herself as Chinese” (Interview with Dr C, July 10, 2010).

Nevertheless this confusion did not prevent her from feeling some kind of a sense of mission of being a scholarship fellow. She mentioned that to counter the anti-Taiwan discourse she would sometimes remove the flyers with unfriendly reports about Taiwan circulating on campus. Sometimes, other Taiwanese students sponsored by the Dr Sun Yat-sen Fellowship, would request her to do that “because it’s her responsibility to do so as a national scholarship fellow” (ibid).

Her overseas studying experiences included realizing that it was possible to discuss exam and deadline issues with her professors, something she was unaware of before she started her course and that all graduate students were treated the same regardless of their backgrounds. Only her advisor, who was from India, seemed to be more conscious of potential issues confronting international students. Moreover, of greater significance was that she took her advice to be more politically sensitive about her dissertation topic in deference to “concern for job hunting
opportunities in Taiwan” (Interview with Dr C, July 10, 2010). This utterance again implied a strong political vigilance of Taiwan’s political tension on the University campus.

Even after graduation, the scholarship program seemed to assist in her career, although she did not elaborate. Not unlike the experiences of the other fellows, little effort and time was spent finding a new position in Taiwan upon the completion of her master’s program. Although she wanted to explore teaching possibilities at another university in Taiwan her mentor insisted she return to the university where she had previously worked as a graduate assistant before going overseas.

If Dr C’s experiences with the overseas study scholarship were affected by the various events occurring at that time, then Dr D’s experience could be seen of the positive type. During his college days, he had wanted to study abroad but could not afford it. After marriage, the possibility of studying abroad became even less because of family commitments. Nevertheless, he did not ignore any opportunity that could let him go abroad. He joined high school teachers and principals on a tour organized by the education authority to Japan and the US. Soon after that trip, he received a grant from the Taiwan government for a six-month research program in the US that gave him the opportunity to take the exam and apply to one of the universities the group had visited.

The scholarship not only changed his life but also one of his family members. He recalled that he was very excited to see his name listed on the public bulletin and set off fireworks to celebrate being listed on the bulletins. He and his wife quit their high schools teaching jobs, sold their apartment in Taiwan, and moved the whole family to the US where his wife pursued a master’s degree program while he read for his doctorate. He described his four-year stay in the US as “the most enjoyable period in my life after working more than ten years at high school”
(Interview with Dr D, Jan 10, 2011). He believed that professional life in the academic community and in the neighborhood helped greatly in broadening his cultural and other perspectives.

After his doctoral program he joined a university in Taiwan as a faculty member and was promoted soon after his first position rising to chair of his graduate institute, dean of college, and later college president. He described that being “honorably recognized” as a fellow of the scholarship program seemed to instill in him a “sense of mission and responsibility” that drove him to work harder than others especially during his studies in the US and his teaching career in Taiwan.

Due to his specialization in science education and his career in academia, the Ministry of Education invited him to be a consultant for educational policies, including for the scholarship program. He believed that his work in relation to the modernization and development of Taiwan was due to his engagement in training high-school teachers in science education that had been an integral part of the technological and scientific development of Taiwan. He exemplified the exceptional scientific performance of Taiwanese students in the Programme for International Students Assessment (PISA by OECD) in 2007 that was testimony to the major achievements in Taiwan’s drive for scientific and technological advancement.

Last but not least is his account about the brain drain in relation to the challenges of the program in attempting to ensure fellows return to Taiwan immediately upon graduation. This narrative actually manifested a discursive shift in the definition of serving the nation since the late 1980s and early 1990s, but was finally put into policy practice in the early 1990s in the scholarship program for the next era, which I will elaborate in later sections.
Dr D mentioned that he did not view the remaining overseas of scholarship fellows as a problem since they could still contribute to Taiwan’s development but in a different manner than those who returned. For instance, he knew many self-funded students abroad who were still very involved in Taiwan and willing support the nation. Therefore he believed that if state funded scholarship fellows opted to stay overseas, they would still contribute. His words are worth quoting in full since they explicitly manifest a complex context that take into account various factors, such as the emergence of globalization and higher education reforms influenced by discursive economic liberalization and marketization since the mid-1980s:

I think today’s historical background is different from that of [the] 1980’s or 1990’s. During that period Taiwan was desperately short of educated and talented people and so needed those educated overseas to return to Taiwan, since at that time there were not many doctoral degree holders. But now it has changed. Since 2000 many universities started establishing doctoral programs, many doctoral degree holders now are facing difficulty in finding jobs. In this case, those scholarship fellows who find positions in a good academic environment should do some post-doc works there or serve at other better institutions…Or if he teaches at a university to send some of his graduate students to come to Taiwan or I think he could take advantage of resources in foreign countries and accept or supervise graduate students from Taiwan for short-term research…or assisting by further training the new generation could also be a way of making contribution. Otherwise he could do nothing if the program forced him to return to Taiwan if there were no job opportunities… So I think we could consider that issue in a flexible manner… Because the context of time and space has been different, being flexible about the forms and time period of recognizing their contributions should be mutually beneficial for the fellows and our nation. We can deploy our people around the world, and invite them to use their influence once our country needs them… Like the Britain called them as “an empire on which the sun never sets,” although the country was not big but there were their people or colonies everywhere… because we are such a small place with high density of population, so we could either deploy our talented people around the world to let them have their impacts in wherever they are, or let them to return to Taiwan for service. Either way works… (Interview with Dr D, Jan 10, 2011)

Although Dr D went to study aboard in the mid-80s, his narratives above were mixed with discourses that emerged from different eras. In the first place, the statements about how talented people benefitting from the program could still contribute to Taiwan in different ways to
alleviate the brain drain issue, but also reflect a discursive trend that highlights the mobility and flexibility of human capital in the larger context of globalization, since not brain-drain, but “brain-surplus” seemed to be a new problem lately. Furthermore, what is striking is the emphasis on the particular type of national influence that could be exerted by fellows not returning to Taiwan. The example of the British colonial experience by Dr D is a case in point. This type of extended influence, however, I would argue was somewhat different from the conventional imperial or colonial power experience. The tight higher-education job market since 2000 resulting from the reforms on higher education in the 1990s, allows one to see how a neo-liberal discourse of globalization was disseminated to higher education in Taiwan. In response to this, discourses that suggested strategically taking advantage of the power of globalization emerged and were integrated into conventional discourses of cultivating talented human resources for national purposes. This will be discussed in the next stage not only because similar points were also brought up by officials involved in policy formulation and program implementation and by the last scholarship fellow, but also that this kind of strategy discourse became more obvious in policy statements after 2000 and in turn influenced the policy shifts.

For the present, it can be concluded that scholarship fellows between 1975 and 1990 experienced varied and different types of political, economic, and cultural shifts. Their experiences influenced and were in turn influenced by the events, issues and discourses of the day such as political democracy, economic liberalization, and their sense of identity. Having said that, their historical mission as scholarship fellows did not change significantly. Similar to their predecessors and self-funded contemporaries returning from abroad, they came into public and academic sectors and formed a solid core of players in their respective roles in the nation’s agenda. The fellows of this era can best be described as the inheritors of the historical mission of
scholarship program for national purpose as well as those importing and blending the acquired knowledge from different fields especially in technology and the sciences to facilitate the development of key technologies for their nation.

1991-2000: A Discursive Shift Mixed with Neo-liberal Discourse and National Development

Following its expansion in the previous stage, the scholarship program underwent further shifts beginning from the early 1990s until the end of the twentieth century. With the termination of the Rules of Overseas Study in 1990, all government involvement in overseas student affairs ceased except for the scholarship program. With the scholarship program becoming the primary tool for the government to direct overseas studies policy, it is understandable that the debates and shifts in the program became even more frequent even as Taiwan was confronted with greater internal and external challenges. During this stage which saw many critical events reflecting the tremendous social and political changes, the discourses surrounding the program were focused not merely on key technological, scientific, and economic development, but were linked more to learning and building up relationships with non-Western countries. Moreover, discourses driven by globalization that emphasized flexibility and mobility in relation to neo-liberalism which foreground education as individual entrepreneurship began to develop.

Learning from and establishing relationships with non-Western countries.

Beginning in 1992, the Commonwealth of Independent States and other East European countries as well as Japan were included in the scholarship program. Although a newspaper report indicated that the MOE established this new category for the purpose of “initiating and developing new relationship with these countries” (United Daily News, 1992, March 4, p. 5), this shift does not imply that those countries did not receive any grantees previously. Rather, these newly created categories specifically for these countries could be seen not only as a response to
the collapse of the Soviet Union but also as a means to search for Taiwan’s identity, which I will
describe later.

In 1993 the MOE relaxed the condition that required scholarship recipients to return
immediately to Taiwan upon graduation. According to the MOE this was “in order to meet
practical needs” and the new regulation which was officially launched in 1994 allowed doctoral
graduates to conduct one year of post-doctoral research abroad. Moreover, they were entitled to
the living stipends of the scholarship during their short-term stays in Taiwan for data collection
was that they reversed the nonnegotiable stipulation of over forty years requiring fellows to
return immediately, but also that in allowing for data collection in Taiwan it inherently
recognized the significance of conducting local research – an indicator of the emerging political
consciousness to broaden and integrate indigenous academic fields. Both measures signified not
only the desire to introduce flexibility in the program but also reflect a changing discourse on the
mobility of human resources since the early 1990s. Although these steps in the program appear
minor, they allow one to perceive the complexity of the subjectification in a broader global
context. This is apparent when viewing the unfolding of the program that came soon after.

In 1995, in line with the “Go South” policy, the MOE encouraged another category for
studying languages, cultures, and the economies of South countries. Initially these comprised
southeast Asian countries such as the Philippines, Malaysia, Singapore, and Thailand but were
further expanded to the southern hemisphere countries in South Africa, the middle and south
Latin America, Australia, and the Middle East, etc. (United Daily New, 1995, June 24, p 5). I
will explain the Go South national policy in contextualizing the scholarship program in the
coming section.
Relaxing, tightening, or a new fellowship? Later in the same year, all three newspapers reported the MOE’s announcement on its drastic revision to the scholarship program (Central Daily News, 1995, May, 6, p. 1; China Times, 1995, May 6, p. 7; United Daily, 1995, May, 6, p. 5). In order to systematically plan the development of human resources that could “genuinely meet national needs,” the MOE strictly limited the fields of research for fellows to ensure that national and social development needs could be sustained. For instance, the fields of research would be narrowed to “history of technology” or “space technology” rather than simply history or technology. According to the reports, this critical adjustment actually also mediated Taiwan’s booming domestic job market because of the sharp increase in the number of returning foreign diploma holders. The trend indicated that human resources in some fields enjoyed surpluses while other spheres experienced shortages in required manpower. It was the intention of the government to rationalize such human resource needs through rigorous planning and limiting the fields of study to those that were critical for national development or in scarce supply as well as to cultivate them domestically. That eventually would facilitate Taiwan in responding to “the trend of internationalization” (United Daily News, May 6th, 2011, p. 5).

Soon after this change towards narrowing down research specializations, the MOE made several minor adjustments such as relaxing the qualifications required for the scholarship program. Where previously students needed to begin their overseas studies within a year of passing the scholarship exam, they now had two years to do that (China Times, June 9; 1995, P. 7).

What was most remarkable was that in 1996, in response to different criticisms about the many deficiencies of the program, the MOE proposed to gradually phase out the scholarship program (MOE, 1996a; MOE, 1996b; China Times, 1996, August 29, p2; Nov. 11, p. 7; United
First mooted around 1973, a proposal to transfer part of the budget of the traditional program to a new fellowship program which selected fellows based on their proposals and statements and did not require them to return for services was revived. The balance of the budget would be used for a National Loan Program for Overseas Study. In this Loan Program, students from the low socio-economic strata who were interested in overseas study could apply for loans from some national banks (MOE, 1997a), while the government would bear the interest element of the loans. It was believed that these two approaches would benefit a larger number of overseas study students by reducing their subsidies (MOE, 1997b). After two years of evaluation and review, the MOE was unable to implement the two projects because of the many technical and practical issues (MOE, 1998; United Daily News, 1998, April 24, p. 19) and the original scholarship program was retained. The two newly designed ideas were not raised again until 2003 and eventually launched while the original program was downsized.

**Contextualizing the scholarship program in the 1990s.** Along with the ideas on modifying or even discontinuing the scholarship program was another phase of the localization movement linked with the emerging discourses on Taiwanese identity, economic expansion, political independence, and internationalization.

For instance, the economic development of Taiwan and its position in international society reached another phase. Discussions on Taiwan’s economic development in this stage were protracted and lengthy, and only some basic statistics in relation to Taiwan’s economic standing in the world are illustrated here. One is that economic development in Taiwan reached a peak following the industrialization programs of the previous two decades. In terms of international trade (Healey, 1991, p. 80), Taiwan was ranked 22nd in 1979, 12th by 1989, and by 1995 was 9th (WTO, 1995). In 2000, Taiwan was ranked the 8th largest trading partners of the
US (US Census Bureau, 2000) while the US had been Taiwan’s number one trading partner from 1990 through 2000 (Bureau of Foreign Trade of Taiwan, 2011).

On the political front, Taiwan went through a series of dramatic changes and reforms. To begin with, it produced the first directly elected president in 1996, Lee Teng-hui49. Lee’s election as president signified a new page in Taiwan’s pursuit of democracy and political evolution (Kagan, 2007). Lee succeeded from vice-president to president upon the death of Chiang Ching-kuo in 1988. As president, he undertook a series of political reforms including lifting the Temporary Provisions Effective During the Period of Communist Rebellion (動員戡亂時期臨時條款) imposed by the KMT-government during the civil wars against the Chinese Communist Party. Soon afterwards he initiated steps to amend Taiwan’s Constitution and renew the National Assembly (國民大會) in charge of amending the Constitution. These critical reforms not only enabled the direct elections of the president but officially reduced the influence of Chinese politicians who fled to Taiwan with the KMT government in 1949. In brief, the reforms dramatically transformed Taiwan’s political and cultural identity. This led to a broader liberal and democratic trend that transformed the political and cultural identity among the Taiwanese,

49 Lee was born during the Japanese colonial time and studied at Kyoto University in Japan. Following that he finished his college degree at the National Taiwan University that was established by the Japanese colonial regime in 1928. Interestingly, sponsored by the China-US endowment partially from American aid (The Council of Economic Planning and Development, 2011b), he went to Iowa State University for his Masters Degree in agricultural economy (Lee, 1999). Later he received a scholarship from Cornell University for his PhD. Upon his return to Taiwan, he became one of most important consultants to Chiang Tsing-kuo’s due to his expertise in agricultural economy and further benefited from Chiang Tsing-kuo’s Tsui Tai-Ching policy.
including the politicians and social activists who drove those series of political and social reforms. These reforms not only acknowledged the political sovereignty of Republican China (Taiwan) that merely covered Taiwan, but also appealed to the need to focus inwards on the many problems facing Taiwanese society.

Influenced by these moves was the series of education reforms initiated during this period. Based on the philosophy of deregulation and liberalization, the primary goal of these education reforms, was to re-examine the education system, including institutions and laws covering the different education levels. Moreover, public opinion called for education reforms to cover curricular issues that focused on Taiwan’s local communities whereas previously it had been Chinese-centered – Chinese history, geography, and China’s interactions with the rest of the world. Eventually it was hoped to free students from exam pressures and re-focus the subject.

In the area of higher education, deregulation of higher education institutions aimed to open channels for easier enrolment in colleges. Along with this aim was the burgeoning trend towards establishing graduate programs which eventually significantly increased the number of graduate students competing for the higher education job market, as described by Dr D in the previous section.

The discourses of democracy and liberalization in education did not come from a vacuum. Along with the grander social and political milieu striving for this trend, several key figures leading the reforms during this period were more inclined per se toward greater “democratic and liberal” education. For example, Lee Yuan-tseh (李遠哲), the 1986 Nobel Prize winner in chemistry, was invited by President Lee to relinquish his faculty position at the University of Chicago and become the president of Academia SINICA in Taiwan and was mandated to lead *The Consulting Council of Education Reform* (行政院教育改革審議委員會).
In addition, three of the five education Ministers between 1990 and 2000 had received their graduate education in the US, while the other two in Europe. More important, two of them were also scholarship fellows (MOE, 2011e). The purpose of this brief departure from the discussion on the genealogical relationship of the educational reforms as well as the studies in overseas education is not merely to illustrate the educational reforms in relation to the social milieu, but to also provide a broad illustration of the profound influence of the overseas study program on contemporary Taiwan.

A noteworthy example was the remark by one of the program conductors interviewed, Ms. X. She noted that the changes made to the scholarship program by different education ministers were fairly much influenced by their own experiences studying abroad. For instance, in 1996 in response to public opinion, the Minister, whose overseas study was self-funded, directed that a new program to replace the scholarship be formulated. On the other hand, a Minister who was a scholarship fellow supported the original scholarship program, since owing to his humble background “he could better understand the significance of the scholarship for students from low SES (Interview with Ms. X, Jan 13, 2011). This is not to say that individual education ministers were the main factors in the shifts in the scholarship program. Instead, it points to the need to take account of the complex interactions between dominant discourses and individual experiences. Moreover, the shifts, in tandem with the globalized neo-liberal discourses, also foreshadowed a further discursive dissemination of education as individual entrepreneurship.

In terms of Taiwan’s relationship with China, President Lee, yielding to public opinion, also re-started a series of dialogues and re-established institutions dealing with China on issues such as the movement of people in the Taiwan Strait, and more importantly, on the issue of China. The issues between China and Taiwan were another set of questions that would need
protracted discussion less related to the scholarship program. More significant in this context was the gradual emergence of Taiwanese autonomy arising from various national policy approaches such as the Go South policy that further exerted pressure on the scholarship program.

The Go South policy was proposed around 1994 during the Lee Teng-hui era. It encouraged Taiwanese commercial enterprises to invest in Southeast Asia implicitly shifting and diversifying their investment focus from China. At the same time, it was aimed at preparing for the enhanced Southeast Asian regional integration through organizations such as ASEAN or the Association of Southeast Asian Nations (Ministry of Foreign Affairs, 2011). Lee’s Go South policy was partially initiated to cater to Taiwan’s entrepreneurial development in China and encouraging them to invest in Southeast Asia. However, it was also formulated in the context of emerging cultural and academic discourses that highlighted the long-term historic, economic, ethnic, and cultural links between Taiwan and Southeast Asian countries. It sought to transform Taiwan’s geopolitical position in breaking out of existing conventional thinking and imagination that was rooted in Chinese-mainland-centralism or Americanism (that saw Taiwan as a balancing chip against China in Asia), but also tried to create a balance between them. It was this complex intertwining of geo-political, economic, and cultural discursive power that provoked some debates about the Go South policy. While there were a series of essays published in a special issue of China Times that questioned Taiwan’s close relationship with Southeast Asian nations from ethnic, linguistic, and economic perspectives (China Times, March 2, March 3, & March 4), Chen Kwan-hsing (2010) pointed out that Go South (Asia) inherently reflected Taiwan’s imperial and colonial imagination about its targeted economic partners in southern Asia. Borrowing insights from post-colonial studies to analyze the discourses surrounding this series of essays, Chen eloquently articulated that Taiwan’s Go South policy as well as the underlying
knowledge claims and efforts was a “sub-imperial imaginary,” since this was also a legacy of American and Japanese imperial imagination in Taiwan towards southern Asia. As Chen articulates, Japan’s imperial perspective was that she could expand and extend its control over southern Asia using Taiwan’s critical position. Chen therefore articulates it was this similar political and cultural imagination that drove Taiwan to form this policy.

Since Taiwan’s economic development and enterprises had expanded to many Southeast Asian countries, such as Vietnam, Thailand, the Philippines, Indonesia, and Malaysia, in terms of the national purpose of designing and developing policies toward Southeast Asia, there was a gradually emerging discourse of the need to understand Southeast Asia coming into being. Moreover, in response to the booming Chinese economy resulting from the economic reforms in the 1980s, Lee intended to utilize an economic policy of No Haste, Go Slow (戒急用忍) to appeal to Taiwanese enterprises to slow down the pace of investing in China. His Go South policy further manifested its political significance of moderating Taiwan’s incremental reliance upon China, especially since the cross-Taiwan Strait issue pointed to a surge in economic interactions between the two countries. In this context, the Go South policy emerged based on complex concerns and became a driving force that led to a change in the scholarship program that encouraged overseas study in Southeast Asia. The significance of the scholarship program in the context of the overall policy changes reveals that it per se was never neutral, but that a policy realized on the program level was always interwoven with political power, economic considerations, and cultural discourse/knowledge claims, all of which at the same time had implicit interrelationships. It was this broad domestic and international context that the scholarship program was situated.
**Dynamic and flexible contributions of fellows to national needs.** During this period, the narratives of scholarship fellows, comprising a policy maker and a program conductor, illustrated very different experiences that blend discourses of mobility, sense of mission for serving Taiwan, and the scholarship as a strategy to deploy Taiwanese human resources around the world.

With the aid of a scholarship, Dr E completed his doctoral program in finance in the US in the late 1990s. He explained that he did not have any strong intentions to study abroad before he decided to sit for the scholarship program exam. Since his family could not afford it, his wife who was keen on overseas study urged him to apply for the program. After his graduation both he and his wife received offers from the American university where they currently work.

Like his predecessors, he noted “experiential expansion” brought about by overseas study that “made you see many things differently. For example, we came to the US and could see what makes America become America, the most powerful country. Which is a very positive experience” (Interview with Dr E, Jan. 11, 2011). In terms of the scholarship as a career stepping stone, although Dr E did not indicate how the program facilitated his current career, he said, “I was confident of having a satisfactory job if I had returned to Taiwan since there was space for my field of research in Taiwan” (ibid).

As the only scholarship fellow interviewed who studied in the US in the late 90s and currently staying in the US, his example provided a very different view that actually reflects a kind of shift that was a mix of discourses comprising fellows’ responsibility towards Taiwan, mobility, and borderless human resources. Firstly, the discursive shift was manifested in his criticisms and his suggestions on improving the scholarship program. Since he decided to remain in the US, he had to repay the government for the scholarship received, including the tuition and
the living stipend. He stated that the subject of reimbursement should be given more thought since requiring scholarship fellows to either return to Taiwan or return the funds expended would not be to the advantage of either Taiwanese society as a whole or the scholarship recipient, especially since the government did not provide any appropriate job positions to returning scholarship students. Such investments by the government would go to waste in any case. Instead, it would be beneficial for Taiwan for the fellows to secure better positions abroad to enhance their capabilities and competencies in their respective professions. Not to mention that eventually they would contribute to Taiwan in many other ways such as sharing their experiences gained in foreign countries or providing suggestions on developing different fields to the Taiwan government. The latter idea actually was related to Dr E’s sense of responsibility as a scholarship fellow. As he explained in his own words in suggesting further improvement to the program:

The other point for the MOE to consider for further improvement is how it could keep contact with these scholarship fellows. There is no denying that human resources are the most important for any organization. It is regrettable that the Ministry of Education just grants the fellowship and makes sure that students either return to Taiwan or return the money and that’s it. In fact for us scholarship fellows we don’t mind it at all if later on the Ministry of Education or any other government organization of Taiwan wants us to provide any form of assistance if we could. But they seem not to really care about this…After all the Ministry of Education expended significant resources in organizing this scholarship. In fact, you select only one grantee for each designated field of study, so it is really competitive, and then you let them go abroad…It is not merely a matter of granting money to support them to study abroad and making sure they return. Rather, the point is how you take advantage of their skills. How the benefits from these fellows also become the benefits for the whole society, eventually maximizing the benefits to all human beings. I think the Ministry of Education should seriously think about how to make full use of this resource, since they are not a burden to the Ministry of Education but an asset…(Interview with Dr E, Jan 11, 2011)

This narrative conveyed the willingness of Dr E to assist Taiwan from outside the country, which, like his predecessors, can be seen as a sense of mission, although manifested in a different form. His suggestions about taking advantage of these overseas fellows were echoed in
different degrees by Dr G and Ms. X in their narratives. Namely, for fellows and program stakeholders of this era, the concept of serving the country extended to a sense of connecting and building up a nexus between Taiwanese fellows going to where they could optimize their professions. In comparison to discourses in the earlier stages of the program that treated those remaining overseas as being disloyal to Taiwan, their situation could now be seen as a kind of patriotism that extended beyond political or geographical borders and more rooted in cultural identification.

Unlike the Chinese, the Taiwanese identity was an emerging one that was also featured in Dr E’s narratives. For instance, regarding the discourse on Taiwan’s development as the purpose of the scholarship program, he mentioned that he was a second-generation Chinese immigrant that came along with the CKS government in 1948, and emphasized that his views were not colored by any personal affective factors:

One crucial issue for the long-term development of Taiwan was to grasp the position of the self and to seek space for survival in international society. This does not imply that Taiwan should attach herself to any country stronger than her. In terms of economic development, I think what has been lacking is institutional infrastructure; namely establishing democracy, law and order, and the concept of human rights. In the case of the US, I think what made them powerful was intimately related to their spirit of law and order, respect for human rights, and the democratic attitude. In this regard I think Taiwan only acquired a superficial veneer of other advanced countries, and did not internalize these spirits. For sure we have been much better than China; but we are also far behind countries such as in Western Europe or Canada. Thirdly is to re-model Taiwanese culture that is co-related to the previous two issues. Namely we could build our own culture that does not highlight high culture, but plebian daily lives. Re-modeling Taiwanese culture means to raise the quality of plebian daily lives. Raising daily life quality includes not only building up infrastructure, better housing, or making more money, but also enhancing people’s consciousness of community everywhere. In political terminology, it is a consciousness of life community for national sustainable development… Finally, I think the government of Taiwan needs some organizational restructuring...(Interview with Dr E, Jan. 11, 2011)
Although his reply did not explicitly link national development with the scholarship program, these thoughts typically reflected several contemporary national issues: Taiwan’s position in the international context, the cultural formation and identity of Taiwan, and the residual elements of linear modernity through acquiring Western advantages. In particular, although the last could assist in Taiwan’s strategic development, it nevertheless has not been a clear-cut adoption. Like Dr E’s comparison, issues of human rights, law and order, and democracy seemed to be absolutely universal, and North American and West European countries the ideal models. At the same time, he also expected the elevation of indigenous Taiwanese culture that could promote the country’s development. Dramatically different from the policy papers of the previous generations that focused primarily on development for a unified China, Dr E directly addressed Taiwanese issues as the focus on national development and, further, distinguished Taiwan from China in doing the comparison, despite this comparison inevitably being a linear one.

**Policy maker and program implementer: Social mobility and national development.**

Both Dr G, a policymaker who could directly supervise and decide on the direction of the scholarship program in relation to overseas education since the early 1990s, and Ms. X, an implementer of the scholarship program, shared similar views about the scholarship in regard to its significance in facilitating low SES students’ upward mobility and to national sustainable development. Since their narratives focused more on technical details after 2000, my focus here is on Dr G’s explanation about the meaning and issues of the scholarship that complemented Ms. X’s narratives to illustrate the latest discursive development.

In view of the importance of the program in assisting low SES students, Dr G noted that due to the strong economic situation there were voices calling for the program to be discontinued. During his appointment in the MOE, he insisted on keeping the program going
since “there would still be students from low SES families needing this scholarship despite Taiwan’s current economic prosperity” (Interview with Dr G, Jan 1, 2011). Ms X, more tangibly provided several professors’ names at universities that used to be fellows from low SES background.

For Dr G, in addition to the above, the other critical goal was to develop human resources for national needs (Interview with Dr. G, Jan, 1, 2011), while Ms. X noted that the three major goals of the scholarship program were to develop skilled human resources for national needs, procure skilled human resources that could not be produced by the nation, and skilled human resources to meet special needs as documented in a recent state presentation made by the division director responsible for the program (培育國家所需要的人才、培育國家所無法培育的人才、培育特殊需要的人才, interviewed with Ms. X, Jan, 13, 2011; MOE, 2005). The later three goals seemed to contain complex paradoxes which remain to be explored, and based on the primary research Dr G’s concerns will remain this study’s focus.

In emphasizing the meaning of national needs in relation to development and like Dr E’s concerns about a sustainable development, Dr. G also addressed this issue by linking the contemporary scholarship program with “national sustainable development” since sending students abroad on the scholarship program kept Taiwan current on the latest international developments. In comparison with the past discursive elements of the program, what remained unchanged was Taiwan’s need for development by staying up to date with “international trends” and sending fellows to other countries towards this objective. This discourse was in fact also noted in Ms. X’s narrative in response to further elaborating on national development and international trends. For the policy maker and the program conductor, the scholarship was not only a crucial channel for potentially talented people to proceed for advanced studies but also a
critical mechanism for Taiwan to stay attuned to the advanced development in other countries, although the mechanism for using these fellows for national needs operated in a multidimensional and complicated fashion both professionally and diplomatically. On his opinions and assessments about the program and its goals, Dr G stated:

No matter it is in a broad or a specific sense, our nation needs to cultivate and preserve talented human resources, otherwise it would be too late in the event you need them suddenly. For sure from the perspective of preserving talented human resource for our nation, you would hope to have them back in Taiwan, and the government is responsible for putting them in the best positions where they can make the most contribution. In this regard, the policy measures seem to not suffice... Anyhow, talented human resource is a significant resource for national competency...Therefore, on a macro basis, the government needs to invest in education to cultivate talented people...for national technological development and economic prosperity. This is the likely reason why most of countries around the world emphasize on the significance of education...As for assisting these fellows...you should prepare them before they leave the country...because they go abroad not only for studying. He could also introduce the advantages of Taiwan to students and local people in his host countries. Therefore he supposedly bears the responsibility of advocating our society and nation...This is supposed to be an additional benefit (for Taiwan)...In this case, the overseas representative offices of the MOE could also take up the job of keeping contact with the fellows...to ensure the national identity of the fellows would not disappear, you need to check on the whole mechanism of consulting the fellows...After all this is a for the benefit of our nation and hope you could make some contribution to our nation...In this case if you decide to stay in foreign countries then the government would not require you to return to Taiwan, since you are also an extension of our nation and which becomes a sort of academic power that could exert influence on other countries’ policies toward Taiwan... So with this foresight it is not necessarily a bad thing to let fellows stay in foreign countries upon their completion of the program...and that could also be deemed as a kind of service for our nation...(Interviewed with Dr G., Jan 1, 2011)

These narratives, which resonated with those of Dr D and Dr E in the 1980s and 1990s respectively, reflected a discursive shift about the benefits of these mobile human resources for Taiwan if used appropriately. As discussed in the previous section on Dr. D’s narratives, a discourse on contributing to Taiwan actually started earlier and seemed to reach a consensus only recently. To be specific, the discourses for allowing fellows to stay overseas after their programs
can be traced back to as early as the 1980s when it was first proposed that the students were not required to return, although it was not implemented until 2003. The discursive integration of flexible and mobile human resources with making contribution to the national agenda from overseas not only reflected the discursive effect of globalization but also how national benefits could be re-envisioned in a more flexible sense. Moreover, this discourse further sustained and evolved to discourse such as *Taiwan’s Deployment Around the World* (全球佈局) in the policy area after 2000. Through this the Taiwan government led by the new Democratic Progress Party, in the name of Taiwan’s subjectivity, initiated moves to actively participate in and exert the nation’s influence internationally.

The question of whether and to what extent precisely could fellows in their overseas positions make their contributions to Taiwan remain to be explored. Nonetheless, as the narratives and practices of most of the five fellows indicated, they were willing to make contributions to Taiwan in different ways based on their appreciation of the scholarship and

50 This statement foregrounds spreading Taiwan’s influence around the world through different strategies, such as increasing the export of a wide variety of Taiwanese goods globally and the sending students to different countries. In terms of educational policy, the Minister of Education prepared an education report in 2004 entitled “Creative Taiwan and Deployment around the World (創意台灣全球佈局)” that reflected the discourse on deployment (Tu, 2004). The minister explained that this report was in response to the overarching policy pillars of the Executive Yuan towards “realizing Taiwan’s subjectivity” and “starting strategic alliances and deployment” (ibid, p. 1). These statements allow one to see how Taiwan’s subjectivity was embedded in the concept of deployment around the world after 2000.
sense of mission as fellows wherever they were located. Certainly the scholarship fellows were not the only group of elites which could exert their influence on government policy, but what distinguish them from the others was that the prestige of being national elites selected from a “centralized” exam and cultivated by the government enhanced their moral responsibility to contribute to Taiwan in various degrees.

In brief, after being in operation for nearly half a century, the discourses between 1990 and 2000 of the scholarship program and the fellows was transformed while at the same time included mixed discourses from the earlier stages. Accompanying the dramatic changes in international and domestic politics as well as the economy, the discourses on the program and expectations toward its fellows also started to shift. On the one hand, the discourses drove it to expand the host countries for purposes such as relationship-building with East European and other countries and acquiring knowledge of Southeast Asian countries. On the other hand, new discourses also started forming that suggested introducing a loan program and fellowship that exempted fellows from the responsibility of returning to serve. Although these two new projects were not launched before 2000, these proposals foretold the coming discourses on flexibility and the mobility of skilled human resources.

This, nevertheless, did not imply that the national influences on fellows regarding their contribution to the nation had faded away. Rather, they remained but in a different form by flexibly considering different avenues for fellows’ contribution to the nation. The discursive emphasis on flexibility was manifested in policy papers after 2000 as actively deploying Taiwan’s influences around the world. This discursive shift, nevertheless, should be contextualized in the grander discourses of neo-liberal globalization and Taiwan’s search for subjectification. While discourses of neo-liberal globalization foreground borderless job markets,
individual entrepreneurship, flexibility, and mobility, discourses of subjectification attempted to help Taiwan step out of the Chinese shadow and claim its own identity in international society.

Accordingly, the role of fellows also started transforming to the missionary kind of expatriates, although adjustments in the program’s practices did not take place till after 2000. These missionary expatriates were expected to assist Taiwan in the general and professional fields in various ways if they chose not to return. Moreover, this expectation would very likely not be denied by scholarship fellows because of their psychological appreciation of the program and sense of mission of being the chosen elites.

Conclusion

In distinguishing the four stages of the scholarship program upon its resumption in Taiwan I attempt to highlight its double-edged and double-sponged nature. From early twentieth-century China until 2000, the program not only played a significant role in “modernizing” early republican China and, later on, Taiwan, but was also contested and marked by different discourses. Discourse of modernization did not come to China and Taiwan in a natural linearly evolving fashion. Rather, it came through the powers of imperialism and colonialism. The initiatives of the Rong Hong Educational Mission Project reflected the Chinese elites’ struggles and attempts to reconcile the Chinese and the “superior” Other, just as the 120 American-educated Chinese students in the project started exerting their influence in modernizing China. Along with the semi-colonialism brought about by western concessions in China, the modernization discourse further permeated and spread into Chinese society. Under these conditions, the Boxer Indemnity Scholarship Program was founded and aimed at civilizing and modernizing China and eventually satisfying American political-economic interests. Nevertheless, in terms of its profound influence, the Boxer Indemnity Scholarship Program
resumed in Taiwan and must be appreciated from multiple perspectives. On the one hand, the
discursive legacy of western advancement and advantages was further manifested in the
scholarship program for the national policy of overseas studies; on the other, it transformed and
mixed with various discourses for different and specific purposes. It was this dynamism and
productivity that featured the double-edged nature of the scholarship program. This will be
explained by answering the research questions.

To answer my research questions, I distinguish the resumed scholarship program into
four stages. The identification of the four stages features the discursive commonalities and shifts.
The four phases were respectively the resumption stage (ca 1955-1959), emerging stage (ca

In the resumption stage, there were debates on the necessity for resuming the scholarship
program. Discourses favoring the program indicated the significance of scientific and

*technologic modernization* for *Chinese nationalism* in relation to the anti-communist
enterprise, while opposing discourses asserted that, constrained by budgets, technological
personal training supported by foreign higher educational institutions, particularly through the
aid policies of the UN and the US sufficed. Driven by an overarching discourse of “national and
social development,” the program would eventually resume firstly through the residual
endowment of the Boxer Indemnity Scholarship Program in 1955 and then through the efforts
and suggestions of a group of social elites. Tracing the connections between the statements
surrounding the discourse on national and social development indicates that the discourse under
this overall cause was to restore Chinese nationalism by borrowing Western advantages. By
restoring Chinese nationalism, it meant not only competing with the “advanced countries” of the
West but also recovering the Chinese mainland that had been “stolen” by the Chinese
Communist Party. The voices that became dominant were the mixed voices of the Chinese nationalists, the Western supremacist, as well as the **anti-communists**.

These discourses inevitably were produced and driven by historical incidents such as Western imperialism and semi-colonialism in early twentieth-century China, the Civil War between the Chinese Communist Party and Chinese Nationalist Party (inclined to liberalism) searching for the appropriate route to China’s modernization, as well as the Cold War order. It was this context that legitimized the resumption of the scholarship program as a strategy of modernization for Chinese nationalism. At the same time, the Cold War order further sustained this discursive strategy, since both the Chinese Communist Party in China and Chinese Nationalist Party in Taiwan received support from the Eastern and Western Blocs respectively.

Significantly, the Boxer Indemnity Scholarship fellows were profoundly influential in the debates on resuming the program since their pressure could be exerted in numerous ways through their key positions in political and epistemological domains, e.g., in government appointments or in academic circles. The examples of Hu Shih and Li Kuo-ting exemplified that in bearing the collective humiliating memories stamped by Western imperialism and, driven by the discourse of Chinese nationalism, the scholarship fellows’ overseas studies that were structured in an uneven power relationship were at the same time assigned a historical mission. Specifically, acquiring the advantages of the advanced countries could not only protect in two senses (the Communist party and Western ideals) but also help to revitalize Chinese nationalism. In this sense, their experiences were more or less circumscribed by these historical events. This manifestation, nevertheless, did not imply the total embracing of Western Enlightenment. Rather, their questioning of Western Enlightenment was manifested as a negotiating strategy used to sustain a better Chinese. In this questioning, their Chinese-ness still remained the primary focus,
although the extent of learning from the West had also pull-push influences. Rather, as noted in
the previous section, the grantees’ roles were structurally designated and defined via a dominant
discourse of nationalism and national development, as well as being part of an ideological
struggle. They were partly conditioned in the way that they were expected to learn and apply
knowledge acquired abroad, even though they might have their own beliefs, convictions, and
concerns. More often, depending upon the individuals, their practices could reflect a kind of
hybridity straddling the main discourses prevalent at that time.

In the emerging stage between 1960 and 1975, the scholarship program gradually grew
both in quantum and categories covered. The primary discourse of national and social
development further inherited the mixed discourses of the previous stages that were inextricably
linked with Chinese nationalism, the efforts of returning to Mainland China, and the ideological
struggles of the Cold War era. These interwoven discourses could be found in the way that the
scholarship program was aimed at cultivating human resources skilled in advanced science and
technology for restoring and reconstructing the Chinese nation in China. In particular, a profound
influence was based on American aid policy rooted in Modernization and Development theories.
Their influence was exerted not merely in their direct involvement in Taiwan, but also in the
discursive effects of their involvement, such as an institution that advocated the liberal approach.
Inevitably, coupled with this discursive package was a tremendous discursive surge on the issue
of the brain drain (mostly to the US), not only because of a prevailing territory-based
nationalism, but also due to the fear of losing indigenous culture in the process of assimilating
American modernity. Consequently, behind these discourses were similar voices of Chinese
nationalists and American liberalists.
The number of scholarship fellows during this stage was still limited. While the influences of fellows of the Boxer Indemnity Scholarship Program remained, new local Taiwan fellows began to exert their influence. The former group, which constituted fellows who came along with the CKS government to Taiwan (and were the dominant political elites at that time), were still mindful of the humiliating history of the late-Tsing dynasty and their “designated mission of recovering China.” For the latter group, however, such as Dr A and Dr B, their personal motivations might not have had much to do with this grand discourse; nevertheless, their deep involvement in government and academic circles was intrinsically linked to the discourse of national and social development. For Taiwan’s local fellows, the general poverty in Taiwan compelled them to take advantage of the scholarship program, and their experiences of studying abroad “re-confirmed” advancement and advantages of the West in different degrees. Through their practices in the government and academia, they spread American advancement in line with the objectives of the CKS government. In this sense, their experiences were partially inscribed and structured by dominant discourses, while at the same time they were aware that not all knowledge from the west was transplantable.

From the mid-1970s until 1990, the discourses actively evolved around the expanding scholarship program. Firstly, the pursuit of national and social development was still inextricably entangled with the China factor, but further transformed to a passive one that, since the early 1980s, did not addressed as much the notion of returning to China. Moreover, this discourse also actively integrated with discourses foregrounding economic and key technological developments in addition to deregulation and liberalization. The discourses of emphasizing economic and key technological development were embodied through advocacy in the
scholarship program as well as through large-scale policy incentives devoted to attracting overseas scholars and those with foreign degrees to return to Taiwan for service.

These discursive shifts seemed understandable when juxtaposed against a variety of crucial political and economic incidents. Internationally, the KMT government lost Chinese representation in the UN while domestically the clamor for greater democracy and freedom grew louder and coincided with the emergence of Taiwan’s subjective consciousness. In parallel with that, Taiwan’s domestic economic development started to take off driven by an approach that combined the free-market and a planned economy. All these events sustained the arguments for continuing the scholarship program for its contributions to furthering key scientific and technological developments.

Similar to the previous stages, the role of grantees in this stage was manifested in their influence in Taiwan over many social dimensions, particularly in government and academia. With the government’s large-scale efforts at encouraging grantees and other overseas scholars to return and the prestige attached to the scholarship program, the grantees could easily secure positions in government or in academe. From the interview data of the two fellows in this era, their experiences of overseas studies could be ambiguous, and, at the same time, affirmative. The ambiguity might have reflected a social milieu driven by different push-pull factors in international and domestic political domains, while affirmation could have been co-related to the stable technological and economic developments of Taiwan in that era. Accordingly, these somewhat diverse experiences could be considered the templates for these discourses of political liberalization, democratization, and the efforts towards key scientific and technological developments, which in turn foreshadowed another discursive transformation.
In the 1991 to 2000 phase, discourses of the scholarship did not entirely depart from giving prominence to **national and social development**. Under this cause was the continuous discourse that further reaffirmed the significance of key technological and scientific development that tied in with Taiwan’s sustainable development programs. This was further combined with discourses of learning more about and **building up relationships with non-Western countries**, such as the former Soviet Union and East European countries, as well as Southeast Asian countries. In spite of this considerably discursive diversification in the scholarship, in the late 1990s a recurrent discourse about replacing the program with a national loan and a new fellowship program that dispensed with the responsibility for fellows to serve Taiwan further foreshadowed a neo-liberal type of discourse that considered education as individual entrepreneurship and accountability. This discourse also coincided with that of individual flexibility and mobility.

All these discursive transformations should be understood within the context of the series of unprecedented international and domestic political incidents in addition to Taiwan’s growing economic and technological influence in international society. Internationally, the ending of the Cold War compelled Taiwan to embark on relationships with the former communist countries, even as the Taiwan/China relationship remained strained, although this was balanced by US involvement. Domestically, Taiwan undertook a series of political democratizing and subjectizing activities. In identification and subjectification, it re-envisioned its own position by re-establishing itself with the Southeast Asian region (and no longer engrossed with Chinese-centralism) and proposed the policy of Go South. This policy was also largely associated with Taiwanese business investments in many Southeast Asian countries. Again it was this complex
grid of contexts producing various discourses that furthered the legitimacy and applicability of the scholarship program as a strategy in response to these incidents.

The narratives of the interviewed subjects in this era similarly mirrored discourses such as sustainable development as the core for national development, although the term “sustainable” reflected both Taiwan’s own subjective position in international society and the constantly changing international trends. Moreover, discourses of individual mobility and flexibility also coincided with general discourses noted in different documents. Hence, one could say that they were partially subscribed to by those discourses in the way that they articulated why and how Taiwan could benefit from the mobility of fellows in the long-term.

In brief, the discourses on the scholarship program shifted constantly along the way but not all that were generated due to events or incidents resulted in changes to the program in the half century since it was resumed in Taiwan. In a recent research that included 380 survey samples 86 percent of scholarship grantees were attached to a university in Taiwan (Jseng, 1997). In other words, at first glance this historical scholarship program can be considered “very successful” with respect to the grantees’ impact on national and academic development in Taiwan. It contributed to the “modernization” of Taiwan by introducing Western knowledge into Taiwan. The success of this project seemed to signify the triumph of the discourse of modernization and advancement, in particular the American type. Nevertheless, a thorough scrutiny of the chain connecting the primary discourses of national and social development through modernization with other statements indicates that discourses changed and transformed along with contingent historical incidents.

Accordingly, it would be arbitrary to claim that the modernization for the purpose of national and social development through the program was merely either a European or an
American kind. It would also be understating reality to claim that Taiwan underwent “the modernization” in a passive sense. Rather, the transformable and productive discourses of the scholarship program throughout its different stages indicate that it was partially conditioned by existing structures, and in turn was influenced and changed by contingent historical incidents. Nevertheless, the profound influences of structure and historical contingencies did not entirely restrict subjects in the program. As the discourse of national and social development went on, the scholarship program was utilized, as part of a policy mechanism, to achieve a broader goal at the different stages. It was an integrative and transformative kind of discursive continuity and consistent adaptability occurring in the scholarship program that could simultaneously reflect the limitations imposed by structures, contingencies of historical incidents, and the adjustability of the program as a strategy. In short, the scholarship program featured an integrative strategy that resisted multiple powers even if in a tactically intransitive fashion.

In this case, narratives of the interviewed subjects had commonalities and differentiations. Although the common themes on the program that emerged in the narratives of the fellows across different generations were not directly associated with a grander discourse of national and social development, the inherent linkages could be identified through their deep involvement in government organizations and academic circles. Their sense of honor of being scholarship fellows and sense of mission of serving the nation in different ways were further intransitively used for various ways of pursuing modernization for national and social development.
Chapter 6

Conclusion and Reflections

Introduction

This chapter discusses the study’s research findings and their implications for educational policy and future research: i.e., the interaction between discourse, structure, and agency; the post-coloniality in Taiwan, its scholarship program for strategic modernization; reflections on the methodology of ethnography of discourse, policy analysis and future research.

Discourse, Structure and Agency

As the analysis of the different stages of the scholarship program demonstrates, dominant discourses travel, change, and integrate with other discourses produced by other contingencies and often are mutually influenced by one another. The discourse of modernization emerged and was institutionalized in late nineteenth century China for the purpose of the Chinese nationalism, and traveled beyond her borders. On the one hand, the discourse of modernization through overseas studies, driven by politic-economic power for Chinese national needs and social development through scholarship was normalized and institutionalized as an overarching cause. On the other hand, a variety of historical incidents produced different discourses. The dominant discourses integrated with the newly emerging ones to further sustain the push for scholarship.

The generative relationship between the structure and discourse seen within the scholarship program reveals that discourses produced by particular power structures were monolithic, but not unshakable. When there is power, there is counter power that might not take the form of direct antagonism. As research on the various historical conditions which Taiwan went through have indicated, socio-political conditions and power structures shifted in many ways: e.g., through influential political and economic events and through cultural evolution (such
as scientific knowledge claims and identity claims). A first reading of Taiwan’s asymmetric power relationships conditioned by power structures appeared to have remained asymmetric. A closer examination revealed that such relationships were neither static nor unmovable. Rather, it is more informing to view Taiwan’s asymmetric power relationships as dynamic, evolving and played by stakeholders with different sources, resources and agendas.

Accordingly, the agency of players played a critical role as well, although the interaction between the program stakeholders and the program was more complexly nuanced. From the perspective of the policy maker and program conductor, the scholarship program largely had two principal functions, firstly for national/social development by cultivating talent needed, and secondly for social mobility. The discourse of national and social development nevertheless was not necessarily limited to pursuing Western modernity, but included accommodating to international trends for sustainable development. At the same time, although the interview data with the scholarship fellows involved in the scholarship program did not reveal that their goals for pursuing overseas studies were for national and social development, their different degrees of nationalism and sense of honor/mission of being scholarship fellows served as motives for their involvement with national projects. Their experiences of being “historical subjects” more or less were inscribed by critical historical events that occurred while they were fellows. At the same time they were differentially aware of the impact of dominant discourses driven by those events.

Significantly, unmasking the complicit relationship between the discourse of modernity and the power of imperialism/colonialism did not reveal that the oppressed agents who participated in the scholarship were entirely muted by this discursive power. Rather, the uneven but productive power relationship embedded in the program during a dominant imperial/colonial discourse, showed that the colonized was neither entirely silenced nor discussed in a
confrontational way. My analysis of the discourses in the scholarship program reflecting Taiwan’s constrained condition since the World War Two until the present day indicates that the structures did enforce the emergence and transformation of the scholarship as a response to the on-going global socio-political structure as revealed in the following series of key incidents.

**A Double-sponged and Double-edged Strategy**

Historical contingencies and dynamic interactions between discourses, structure, and agency that reveal a strategic dimension of the scholarship program with a double-edge.

A double-sponge strategy that utilized others’ advantages in a triple play. A scrutiny of discourses throughout the scholarship program over the past century shows that the inception of the program in the early twentieth century China contained an imperial discourse of adopting enlightened and advanced Western Modernity. In this sense, the discourse of overseas studies, formed as a problem in the Chinese policy domain, was inevitably a discursive product of imperialism and semi-colonialism. On the other hand, discursive combat within the program also multiple adaptive tactics at different historical moments. Before the scholarship was resumed in Taiwan, the dominant discourse of learning from the “enlightened and advanced” led by Chinese nationalists was coined with an intention to defeat imperialism and semi-colonialism. After the scholarship was resumed in Taiwan, the Cold War zeitgeist re-defined the object of resistance. Namely, KMT government meant to resist and recover Mainland China by borrowing Western advantages and advancements. Even after the dissolution of Cold War, the strategic sense was reflected in dominant discourses of the scholarship seen as enhancing Taiwan’s understanding of other non-western countries and to further its influences around the world.

At this point, it may be instructive to examine aspects of Ong’s “Alternative Modernity” (1999). Ong’s work poignantly set up a referential framework for understanding the Asian Tiger
economies, but had its limitations. As she indicated, the approach of East Asian counties’
alternative modernity did not necessarily criticize, nor opposed capitalism. Rather, this view of
alternative modernity meant to largely borrow from the West to deflect the West. Ong’s
approach, in spite of providing a useful framework for examining Asian Tiger economies to
mediate the force of capitalism, is a poor fit for understanding the case of Taiwan’s scholarship
program. Consider, for instance, how the emphasis on the Asian Tiger Economies and the West
inevitably was tinted by dominant bipolar discourse by “Tiger counties as a homogenous whole”
and “their Others – the West”. For Taiwan, however, as the discourses shifted from anti-
communist enterprise, to human resources planning for economic purposes and then to the
development of key technologies and sciences, to search for an extensive relationship with
countries other than America. The strategic development of this scholarship program indicates,
how different meanings of national and social development were heavily influenced by Taiwan’s
relationship between the US and China. In other words, a simple bipolar model cannot
adequately reflect Taiwan’s condition during this era.

In brief, it is the emerging and transforming discourses operating in the scholarship that
reflect the strategy that Taiwan used to imitate Western advantages to survive during its
resistance to China while balancing its relationship with the West. The tripartisanship that confronted
Taiwan challenges the simple duality which current post-colonial theories oftentimes expound. I
would suggest the relevance of this tripartisanship to cases such as Singapore’s nuanced relationship
with Malaysia and its previous colonizer, the British; and to South Korea’s relationship with
North Korea and U.S.

A double-sponged strategy and its inherent double-edge. My presentation of the
scholarship program’s strategy neither implies the success of the program, nor does it suggest a
further expansion of the program. Rather, the strategy, designed and considered to sponge

different “advantages” of the other, in fact, also was double-edged where criticisms of “learning
others’ advancements” was lacking.

For instance, for the survival purpose Taiwan adopted planned liberalism and capitalism,
which strengthened Taiwan’s economic competence to enable it to integrate it intimately with
the international economy as well as mediate its direct conflict with China. Simultaneously,
Taiwan’s capital expansion in southeast Asian countries inevitably made her a new regional
power. Her economic expansion, coupled with its emergence as a political power in
international society and cultural discourse of Taiwan as a successful model, came with an
inherent trap of imperial/colonial narcissism that objectifies its “others”. Fanon’s observation
about the risks brought by a recent nationalistic emergence confronting the process of anti-
colonialism provides some of the underpinning of my criticism, although it is an incomplete
rationale for understanding the case of Taiwan. As discussed in Chapter Two, Fanon pointed out
the danger of a simple appeal to return to the “original identity and culture.” He further indicated
that national consciousness should transform into a social and political consciousness and a
humanism to avoid a dead end (1963, p. 144). Along with the long-term development in this
constrained relationship between China and US, Taiwan recently started to claim its “own
sovereignty and identity” through re-articulating its culture, although it had been a challenge of
distinguishing its “own” culture after such a long history of colonization by Japan and a Chinese-
center way of narrating history. Another effort of pursuing Taiwan’s independence reflected in
the scholarship program was the measures of learning and other non-American countries (in
particular in Southeast Asian Countries) and building up closer and realistic relationships with
them. Additionally, in the narratives of Dr. C, Ms X, and Dr. G., each of them coincidently used
examples of Britain’s world-wide influence to illustrate the necessity for Taiwan to deploy talented human resources around the world to enhance its influence. It would be wrong to interpret Taiwan’s extension of power through its cultural and academic influence as another example of a classic type of imperialism and colonialism. Nevertheless, it does describe the emerging complex interwoven power of Taiwan’s claim as an independent sovereignty with its emerging identity and economic expansion coupled with the advocacy of Taiwan’s cultures. The discursive emergence of this line of thinking, I suggest, needs a more thorough examination and further critiques to prevent it from becoming yet another kind of enforcing power predicated on subjective identification and self-defensive strategies.

**Post-coloniality of Taiwan: Mimicry, Hybridity, and Strategic Modernization**

The above discussion on the strategic scholarship program in the subtle triple-relationship that Taiwan’s confronting brings up another larger question through to which this research, by investigating discourses, set out to address: the post-coloniality of Taiwan. Instead of entering into a debate arguing the nature of Taiwan’s condition that requires more data, here I shall focus on several themes concerned with post-colonial literatures that the this research directly encountered: mimicry, hybridity, and the problem of Modernization.

**Mimicry.** First of all, the scholarship program reminds one of mimicry that the colonized are imposed to undertake. Bhabha, as discussed in Chapter 3, chararacterized colonial mimicry as “the desire for a reformed, recognizable Other as a subject of a difference that is almost the same, but not quite” (Bhabha, 1994, p.122). At first glance, “learning advancements and advantages” of the West for the national and social development of the scholarship program appears to be a case of colonial mimicry.
In order to distinguish Taiwan’s strategic from colonial mimicry, attention should be given to the multi-layered on-going relationships confronting Taiwan, quite different from those found in a colonial-colonized relationship. In comparison with the colonial history of India, from which Bhabha theorized the idea of mimicry, Taiwan was never officially colonized by America, but by Japan. Taiwan’s aspiration for American Modernity (manifested in the way of learning American technology and sciences in the early stage of the program), from the Chinese nationalist perspective, initially was discursively enforced by the America for the purpose of resisting imperialism and semi-colonialism. It then gradually became a self-initiative strategy, by developing technologies/science and staying in the “international loop”, as a means for the CKS government in Taiwan to resist Communist China. Chinese-centrist discourses of the KMT government were further complicated by the discursive shifts towards a de-regulation and democratization in the scholarship since the mid-1980s. This shift not only reflected the broader disruption of the Chiang Kai-shek regime, but also signified a discursive position foregrounding Taiwan’s quest for an independent identity.

These multi-layered ongoing relationships were burdened by historical contingencies that converged upon Taiwan, far beyond a mere colonial-colonized confrontation. The multiple dynamisms are crucial for understanding the strategic sense of mimicry in the scholarship program that differed from a binary colonial-colonized relationship foregrounding the dynamics between two parties. In this multiple interaction, mimicry not only was partial and instrumental, but also had preference. In this context, strategic mimicry was used to resist a third party such as the CKS government’s discourse of adopting western technologies for resisting the CCP in China or later on discourse of Lee Teng-hui era, with its intention to rid itself of Chinese-centrism, was inclined to connect with southeast Asia and other non-American countries. In this
sense, mimicry of the scholarship program had its utilitarian purpose and imagination. This instrumental mimicry distinguished itself from the direct colonial-colonized confrontation by purposefully galvanizing against a third party.

**Hybridity.** In this sense, the program seems to produce a group of academic, social, and political elites who encorporate hybrid practices that reflect what Bhabha termed “in-between hybridity” possessed by the colonized. Although post-coloniality of Taiwan has been shown to be qualitatively different from that described by most post-colonial literature, hybridity in Taiwan might be rather appropriate. The hybridity of Taiwan resulted not only from Chinese and Southeast Asian ethnic diaspora, Japanese colonization, but also from the KMT-government traveling domination and close interaction with America. The strategy of adoptive learning from the West also came into play. These productive interactions formed a dynamic structure within which Taiwan had been situated. Hybridity inscribed by multiple powers in political, economic, or cultural ways in Taiwan were also productive for these powers; E.g., the US’s reliance on CKS’s government for stopping Communist dispersion. In brief, these multiple layered relationships were a flexible hybrid, not rigid, static, and unalloyed (Bhabha, 1994, p. 233).

**Strategic modernity in Taiwan’s post-coloniality.** The discursive shifts in the scholarship program offers a complex case: a mixture of the legacy of previous imperialism with semi-colonialism in China, the Cold War, and economic issues within its political, economic and cultural domains. As Hall indicated (1996), post-colonial theory, in spite of its deficiencies, is useful for distinguishing phenomenal convergences of world politics, global economy, cultural diaspora, as well as epistemological efforts involved within this complexity. The discursive complexities found within the scholarship program are a case that requires post-colonial theories to go beyond binarism to achieve sensible description and understanding.
An issue in post-colonial theory of crucial concern is the complicity of the monolithic discourse of Modernization found in academic works on imperialism and colonialism. What the complexity of this scholarship offers was an alternative for explaining various structural conditions and historical incidents. It was developed, by borrowing others’ advantages and advanced strategies, not merely to “deflect West’s multiple domination”, as Ong called it (1999, p. 36), but also to react to other constantly emerging powers or incidents. Consider for example viewing the Communist China from the perspective of Chinese nationalists in Taiwan, and then devising a general effort for democratization (or subjectification from Taiwanese locals’ perspective) when speaking with China and the CKS government. Foregrounding the parts of this “strategy” hardly makes it a proactive or a coherent tactic, but does distinguish the multiple dimensional structures facing Taiwan and how they compelled it to take a strategy to respond to them. In this, I’ve tried to characterize the fluid flow of discursive powers within Taiwan and their productive interaction with other powers outside of Taiwan.

In this constantly adjusting strategy, scholarship fellows and policy makers played their particular roles. The common themes that emerged from narratives of fellows across different generations were not explicitly related to national and social development. Nevertheless, their diverse narratives reflect crucial dominant discourses in their own eras. Under a loosely defined but compelling discourse such as the national and social development, different discourses emerged and were debated throughout the various eras. There appears to be a connection between the discourse of national/social development and fellow’s sense of mission/honor/appreciation. Namely, their sense of mission/honor/appreciation drove them to meet the national and social needs as they were variously defined in different eras.
Ethnography of Discourse

This research set out to juxtapose two different methods rooted in two different worldviews that inherently addressed different concerns. While critical discourse analysis is concerned with discourse driven by power relationships, the ethnographic interview is interested in representing the experiences and reflections of its informants. The purpose of juxtaposing the two was to triangulate the data.

As presented in Chapter Five, the two sets of results: first, the five common themes of the fellows; and second, the primary discursive shifts identified from government papers and newspapers seemed to tell two stories that did not greatly overlap one another. But, they were not conflicting, and in fact connections between the two can be made. Namely, from the level of macro/policy discourses, the utterances of and about the scholarship were indispensably engraved by various historical contingencies producing discursive powers. A thorough scrutiny of the narratives from the interviewed subjects also reflected inscribing marks in different degrees. In the end, my presentation of the findings stresses the broader sense of discourses derived from national and societal levels by illustrating the roles of the program’s participants. The presenting research results with an emphasis on the grand dimension was governed largely by my research questions, and inevitably influenced by my data collection procedures.

Regarding the procedure of data collection, limited by time and resources, I prioritized the critical review of different kinds of documents, particularly state documents from the MOE and the Congress of Taiwan, as well as newspaper reports, since they were more accessible than were interview narratives. An earlier review of documents and reports also formed my early argument that placed emphasis on the grander dimension.
Moreover, challenges embedded in my interviews exerted influence on my being cautious in my interpretation of the interview data. These challenges included the selection of interviewed fellows and policy makers, limitations surrounding phone interviews, as well as departures from the sequence of asking my interview questions. As I discussed in Chapter Three regarding the selection of interviewed subjects, although invitations were sent to fellows who were entirely unknown for me, it coincidently turned out that all of the participated interviewees turned out to be either from networking or personal acquaintances. Since they all were beneficiaries and also had knowledge, to some extent about my previous involvement in the Ministry of Education, they presumably were more inclined to the present “good sides” of the scholarship program and be less critical in their remarks.

In addition, constrained by resources four out of the eight interviews were conducted by phones or Skype. Although in principle all interviewees by phone completed the same interview questions, some questions seemed not to elicit as thorough a discussion as the face-to-face interviews did. Limited by time pressure by phone interview and the fact that many of them did these phone interviews during their office hours, it seemed to be particularly hard for them to respond to questions that were designed to require more time to think and elaborate. Although I should have tried to following up some questions, my cultural (Taiwanese) consideration of interpersonal politics discouraged me from follow-up questions and follow-up phone calls.

The last potential challenge was also closely connected with the previous two challenges. Namely, in order to fully prioritize their subjective experience of overseas studies, the questions about their understanding of modernization in relation to national and social development (ones designed to provoke possible critical conversations with the researcher) were at the end of the interview. When it came to these final questions, although some of informants truly provided
their own understandings (e.g., Dr G, “national and social development should be sustainable and compliant with international trends”, while for Dr E, “national and social development was related to sustainability of Taiwan in relation to China in the international society”) But others considered the answer to the question as universally understood and somewhat redundant. The latter situation also constrained a further analysis of interviewees’ understanding of this discourse in relation to the program.

In spite of the aforementioned concerns, I nevertheless assert that overall their interview data shed light on our understanding of the scholarship program. Their views enhanced our understanding of the scholarship program as a useful strategy under constrained and constantly changing conditions.

**Implication for the Research of Educational Policy Analysis and Conduction**

There are three implications for further research. The first and second are suggestions for future policy analysis and program evaluation, while the third one is for the conduct of policy implementation.

Firstly, I suggest a more critical approach in our research on educational policy in international settings. As the literature review of existing research about the scholarship program indicated Chapter Three demonstrated, most of the existing research regarding the scholarship program, as a significant constituent of educational policies for overseas studies, has been occupied by research issues either engaging with its Modernizing impact or concerned with scholarship fellows’ individual developments. Undoubtedly, every research has its own interests that are rooted in different values. Policy analysis focusing on effectiveness and impact of the stated goals of a policy or a program has its particular contributions. Similarly, critical approach of policy analysis and ethnographic works can also be helpful in providing a diverse perspective
for educational policy analysis. As this research attempted to show, by juxtaposing the critical approach of discourse analysis and ethnographic interpretation, educational program with benevolent purposes and usually conceived of neutral and independent from all of political and economic powers, can be understood to be driven by different political and economic power.

The critically disclosure of multiple powers driven by various historical incidents of this research does not mean to judge, but to open more discussions on policy research with the hope of providing some new directions for policy formation and conductions. With this regard, Michael Foucault’s remarks about criticism without judgment should shed light on my suggestions of conducting a more critical approach to educational policy analysis. Foucault noted that,

> I can’t help but dream about a kind of criticism that would try not to judge but to bring an oeuvre, a book, a sentence, an idea to life; it would light fires, watch the grass grow, listen to the wind, and catch the sea foam in the breeze and scatter it. It would multiply not judgments but signs of existence; …I’d like a criticism of scintillating leaps of the imagination. It would not be sovereign or dressed in red. It would bear the lightening of the possible storms (Foucault, 1988, p. 326).

With this passage, Foucault creates a space for a kind of criticism that does not judge, but evokes stimulating discussions that engender diverse possibilities for understanding educational policy. His insight goes beyond the conventional presumption that being critical about a policy or a program means judging its effectiveness or values.

When value and knowledge claims are oftentimes so rigid and forcefully asserted, their rigidity or belief in them prevents one from challenging them and examining the disguised power behind their formation. Using critical discourse analysis as an analytical framework allows one to consider value and knowledge claims as volatile discourses, and to direct one’s attention to dynamic power relations. Since education policy and its programs are primarily involved in persuading a value that is supposed to be good education, they should also seek a vigilant
awareness of the different values are driven by the different powers that are contesting and changing educational programs and policy. Eventually, reconsideration of a policy or a program via being aware of productive power relationship embedded in scholarship program also facilitates possibilities of changes.

A further comment about data collection methods related to issues about my interview methods discussed in previous sections is appropriate. For the future employment of interview methods in ethnography of discourse, I suggest an appropriate increase in the number of interviewees to enable data verification and triangulation. A larger number of interviewees would be critically important for research concerned principally with discursive shifts at various historical moments. Although the present research identified critical discourse over different historical stages from documents and reports, greater numbers of interviewees might vibrantly characterize un/common discourses throughout various stages.

An intriguing suggestion for policy and program conduction came from interview data: the issue of social equality, including how the scholarship program facilitated social mobility, equal gender and ethnic distribution. Every fellow, policy maker and the program conductor addressed as a critical concern the scholarship program goal to mobilize social status by providing opportunities of studying abroad to people from low SES. Nevertheless, the five interviewed follow were all from elite universities and four out of five either worked as lecturers and teaching assistants or high school teachers. This finding might have resulted from a snowball sampling. It also could be the result from a more complex issue related to social class. The social class of my interviewees is unknown. The point is to suggest that becoming aware of the complexity of class in relation to the goal of the scholarship program would be a worthy undertaking. This complexity was implicit in Dr C’s note about being selected as an elite.
Considering her family background, she believed she was merely fortunate to be selected. Another case that briefly mentioned the issue was a fellow who participated in the early pilot study of this research: “We (as fellows) were actually the privileged\textsuperscript{51}”. All of these remarks seemingly contained a noteworthy issue, that was not addressed by the present research, nor by other researchers to date.

\textsuperscript{51} This interview was conducted in June 2009 for the pilot study of the present research. The interview data was not adopted here because the interview was not completed, although the fellow, a famous Marxist scholar in Taiwan, pointed out some issues of central concern in this research, such as knowledge production.
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為我所用、特向行政院提出質詢 [Legislator Hong Chao-nan’s interrogation to the passive and disturbing attitude of the government towards limiting little overseas students’ parents from holding passports of tourism. The government should take active measures to earn the hearts of the little overseas students for our national usages]. 立法院公報 [Public Bulletin of Legislative Yuan], 74 (104), pp. 78-79

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Appendix A

Interview Protocol and Questions for Scholarship Grantees

Explanation and consent issues

- Explain the purpose of the interview and explain the fellowship program
- Read consent script via phone/or skype
- Assure confidentiality
- Ask for permission to tape
- Express gratitude
- Ask if they have questions for me

Interview Questions

1. When did you go study abroad with this program? Where did you study and how long have you been there? What was your program or course of study? (請問您於何時出國留學？留學的國家與留學年數？攻讀的學位與領域？)

Prompt:
Could you tell me a bit more about the country where you went to study abroad?

What was the reason you chose to go there? (可以請您多談談留學的國家嗎？您選擇到那裡留學的原因為何？)

2. Did you plan to study abroad before you sat for the proficiency exam of the scholarship program? What made you think of participating in this examination? (請問您在考上公費留學前，本來就有出國的計劃嗎？當初如何想到要參與公費留學考試的？)
Prompt: What was your motivation to take the exam and study abroad? (可以請您談談當初報考公費留學考試和出國留學的動機為何？)

3. What was the status of your field of pursuit in Taiwan at the time you left? What was the general social context in Taiwan at that time? For instance, political, economic or international situation? (請問您攻讀的領域當時在台灣發展的情況如何？可以談談當時的社會大環境嗎？例如政治、經濟與國際環境？)

4. Tell me about your experience studying overseas with the program. What was it like? Will you please share with me an important experience you had while studying abroad with the program? (您接受公費留學獎學金出國留學的經驗如何？可以請您可以提供一個重要經驗嗎？)

Prompt: Would you please provide a positive and a negative experience you had? Could you tell me a little bit about what you liked or disliked about it and the reasons? Describe to me an ordinary day at school. What did you do in a normal school day, a weekday, and a semester break? Did you like to hang out with Taiwanese friends who went there at the same time? Did you mix socially with the locals? (後續：請各提供一個正面與反面的經驗，可以請妳說說喜歡的部份和不喜歡的部份？原因為何？可以請妳描述你在學校一天的生活是怎樣的嗎？放假的時候都是怎樣的呢？主要和朋友做什麼？喜歡和同去的台灣朋友交朋友嗎？喜歡和當地人交朋友嗎？)
5. Could you describe your professional situation/experience after returning to Taiwan? How was the social condition/context/situation in Taiwan at that time? (可以請您談談回國後的情況或經驗如何？以及當時的社會環境與背景？)

Prompt: Were there major changes you saw in yourself? If “yes,” what were they? When you returned to Taiwan and talked to your friends and family, did the nature of your conversations change? Were they interested to know what you did overseas? In what ways? Did that change your relationships with them? How were you conscious of it? (後續：您認為自己主要的改變有哪些？當您回到台灣和朋友與家人聊天時、有注意到在談話的本質是否有改變？他們對你在海外的生活感興趣嗎？如何感興趣？這樣的經驗是否改變了你和他們的關係？你如何注意到這樣的改變？)

6. What has been the impact of the government sponsored scholarship program on you? Please elaborate (可以請您說明公費留學給您最大的影響是甚麼？)

Prompt: How do you see your current life, career, and daily practice in relation to your experience of studying abroad with the fellowship? (What has changed? What has remained the same?) (後續：您認為您目前的生活、職涯發展、與日常實踐和您公費留學的經驗的關係為何？)
7. Generally, what is your opinion of scholarship program? Please provide at least one positive and negative opinion (廣泛說來，您對公費留學政策的看法如何？可以請您至少各舉一正面的與反面的看法) 

Prompt: Could you suggest a way to improve the program? (您可以提出一個建議來改善公費留學考試嗎?)

8. What do you think is the impact of the scholarship program on Taiwan today? (您認為公費留學考試對今日台灣的影響是什麼？)

Prompt: Please provide at least one positive and negative example (後續：可以請您各提供一正面與反面的看法)

9. In the documents describing the scholarship program, one of the goals is to facilitate Taiwan’s national and social development. What are your views on this? (依據公費留學政策說明的一些資料如下，公費留學考試的目的之一，是為了促進台灣國家與社會的發展，您對此目的看法如何？)

Prompt: Providing the educational ministerial report to Taiwan’s Congress attached next page

Prompt: How do you see your own role in relation to this view? (您如何看待您自己的角色和這個目的關係？)
10. I have finished my questions about the program. Are there other questions you think I might have asked? (我已經問完所有關於公費留學考試可以問的問題？請問有沒有其他問題您覺得我應該要問但是沒有問的？)

PAUSE to let them think the question

Prompt: If you were doing the study, what else would you have explored? (如果是您自己作這個研究、您還會探討哪方面的範疇？)

Original Chinese Text:

同時國家選送留學生之目的，乃是基於國家建設需要，如培植人才，不能適應國家需要，則應立即廢除，何況目前我國旅外之學人學生為數三萬四千餘人，均各學有專長，政府如有需要，儘可設法徵召回國服務，不必多行選送公費留學生出國留學。

…按我國自前清同治十一年(1872)年起、政府接受容閎先生建議，開始選送幼童四批，共計一百二十人，以公費前赴美國留學，迄今已歷一百零一年…但在最近二十年餘年來，由於各方面的情勢變異，我國學生競以出國留學為榮，形成一股歷久不衰的熱潮。本來出國留學乃是一種補助教育方式，利用人家長處來補足我們的不足，而現在則形成以留學為一種常態教育的延長，大學幾乎成爲出國留學的預備教育。為了糾正此種風氣，實應考慮取消一年一度的公費留學考試，而於認爲確有必要時再行專案考選...

實際上，我國自新制教育實施以來，始終是以奠定我國高等教育發展的基礎、確立我國學術研究獨立的精神爲主旨。只是在本國學術人才與設備不足、及國際學術合作的必要情況下，始由政府輔導優秀青年，有限度地從事出國進修，並需返國服務。所以
在政策上：一貫是以發展本國的教育與學術為主，並以有限度地輔導出國進修為一種輔助措施…

總之，留學政策的制訂，一方面要顧慮到國家教育學術發展的基本需要，一方面要衡量經濟社會發展的客觀情勢，以及青年人個人的意願…(立法院教育委員會第五十二會期第八次全體委員會議紀錄)

English Translation:

…The main purpose of sending students for overseas study is to meet the needs of national development. If the human resources developed through the program/policy cannot meet the national need, then it is pointless to keep the program/policy. Not to mention that there are currently over 34,000 overseas students with individual specialties. The government could just recruit those overseas students to serve the country and does not need the policy of encouraging students to study abroad…

Our educational policy of overseas study started in 1872 when the Tsing Dynasty sent 120 students to study in the USA and has undergone 101 years... In recent 20 years alone, with many dramatic changes in our society, many students become so proud of studying abroad and swarm for overseas. It has become a hot long-standing trend. If the government continues promoting overseas study, it will then unconsciously foster this trend. Overseas study should be conceived as a supplementary education. By which we could learn others’ advantages to complement our own shortages. Now overseas study has become an extension of formal education. Our university education turns out to be the preparatory education for overseas study. In order to correct this trend, we should seriously consider discontinue the annual exam for the scholarship program for overseas study…
As a matter of fact, since we started our modern educational system, the ultimate goal is to set up a solid foundation for developing higher education, and to ensure the capability of conducting academic research independently. However, concerning the domestic shortage of human resources and research facilities, as well as the necessity of international educational cooperation, the governmental measures for encouraging outstanding youths to study abroad should keep in a reasonable manner and require them to return to serve our country. Therefore, our policy should aim for developing our national education and academy, which is facilitated by reasonable measures of guiding students for overseas study…

In short the policy for overseas study should take into account the fundamental needs of developing national education and academy. At the same time, it should strike a balance between the economic development of our society and the youths’ individual inclination… (Legislative Yuan, 1973, pp. 9-11)
Appendix B

Interview Protocol and Questions for Policy Maker and Program Conductor

Explanation and consent issues

- Explain the purpose of the interview and explain the fellowship program
- Read consent script via phone/or skype
- Assure confidentiality
- Ask for permission to tape
- Express gratitude
- Ask if they have questions for me

Interview Questions

1. Tell me something about yourself. How long have you been involved in this program? What was your main role in this program? (可以請您簡單介紹一下自己、以及您參與辦理公費留學多久了？您辦理公費留學政策主要的工作為何？）

2. How would you describe Taiwan’s social milieu and environment at the time when you took up this role? For instance, political, economic or international environment. ( 您會怎麼形容當時您辦理公費留學時的社會氣氛與環境？例如政治、經濟與國際環境？）

3. What is your assessment of the scholarship program for Taiwan students on overseas study? What is your experience in managing the process? (您對公費留學政策的評估如何？您執行公費留學考試的經驗如何？)
Prompt: Please provide at least one positive and negative opinion? (後續：可以請您至少各舉一正面與反面例子)

4. From the perspective of policy makers/conductors, what realistic purpose do you think the scholarship program could achieve? What do you think was an important challenge of conducting this scholarship program? (從政策制定者/執行者角度來說，您認為公費留學考試可以達到的實際目標是甚麼？以及執行公費留學政策的挑戰是甚麼？)

Prompt: Do you think the program could be improved? Prompt: What might obstruct such an improvement? (後續：您認為公費留學政策可以被改善嗎？有什麼因素可能阻礙改善？)

5. What do you think is the impact of overseas scholarship program on Taiwan today? (您認為公費留學考試對今日台灣的影響是甚麼？)

Prompt: Please provide one positive and negative opinion? (後續：請舉一正面與反面例子)

6. What were your original expectations for the program? Have your expectations changed over time? (您對公費留學政策原本的期望如何？這樣的期望有隨時間改變嗎？)Prompt: What helped fulfill your expectations? What hindered? (後續：哪些因素有助於達成這樣的期望？哪些有阻礙？)
7. In the documents describing the scholarship program, one of the program’s goals is to facilitate Taiwan’s national and social development. What are your views on this? (依據公費留學政策說明的一些資料，公費留學考試的目的之一，是為了促進台灣國家與社會的發展，您對此目的看法如何？)

Prompt: Provide a program material/or newspaper reports in this regard (Appendix A the second part) (後續：提供相關資料請其參考回應)

Prompt: How would you understand and describe the term “national and social development”? Would you say that your understanding is shared by many others? (後續：請問您會怎麼理解與形容“國家與社會發展”這個詞的意義？您認為您這樣的解讀是和其他人一樣嗎？)

8. If a completely new program were to be created, what might it look like? (如果您們要重新開始一個嶄新的留學政策？您希望他看起來是怎樣的呢？)

PAUSE to let them think about questions/issues

Probe for economic, political, and philosophical parameters of whatever program the policy maker describes. (所以這樣的的留學政策理念和經濟、政治環境是如何連結呢？)

9. Would you please help me by raising a question or questions about the program that I failed to ask? (您可以幫忙我提出關於公費留學政策我沒有問到的其他問題嗎？)

PAUSE to let them think about questions/issues

Prompt: Continue the conversation. (所以您對這個問題的看法如何？)
Appendix C Author’s Biography

The author holds her Bachelor of Art in German Language and Culture at Soochow University and Masters of Art in Adult and Continuing Education at National Taiwan Normal University in Taiwan. She worked at German Institute in Taiwan for nearly one year. Subsequently, she worked as a civil servant in the Bureau of International Cultural and Educational Relations in the Ministry of Education, where her major responsibility was assisting to develop national educational policies and programs for cultural and educational exchanges. During the seven years in the MOE, she was also posted to the representative office of the MOE in Berlin, Germany for diplomatic in-service-training and subsequently to the representative office of the MOE in Chicago where she further assisted with developing and running a wide variety of educational programs for educational exchanges between Taiwan and the US.

Her main research focuses are international politic-economy in education, globalization in education, cultural studies in education, as well as educational policy and program evaluation.