

The Changing Role of the Institute of International Relations in Taiwan's China Studies: Trajectories and Dynamics*

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In the past six decades, Taiwan's China studies have undergone a gradual shift from a focus on policy analysis and political indoctrination to one that is centered on scholarly research with policy analysis as its secondary aim. During this process, the role of the IIR has shifted from that of a government think tank, monopolizing China studies and serving the top brass jointly with other state-dominated research units, to a competitor for academic achievement and policy influence in a pluralistic academic and political market. This article will examine this marked transition across three dimensions: the IIR's relationship with the state, the educational backgrounds of IIR research fellows, and the editorial policy of major IIR journals. This article argues that the dynamics of such a transformation come from generational replacements of scholars on the one hand, and the amelioration of cross-Taiwan Strait relations and political and educational developments in Taiwan on the other.

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Periodical assessments of the study of an academic field are crucial to the further progress of the field. Since the mid-1990s, several assessments have been made of the state of contemporary China studies in different countries, from North America and Europe to East Asia.¹ These appraisals help us in understanding research focuses and debates, trends in approaches, methods and data sources, changes in academic manpower and resource allocations, and the dynamics of changes in the China studies field in different regions or countries throughout the world. Owing to the needs of national security and politico-economic development, there has always been strong demand for China studies in Taiwan. Nevertheless, the development of Taiwan's China studies has rarely been evaluated in the existing literature, particularly in the English-language literature.²

¹David Shambaugh, ed., *American Studies of Contemporary China* (Washington, D.C.: Woodrow Wilson Center Press, 1993); Avery Goldstein, "Trends in the Study of Political Elites and Institutions in the PRC," *China Quarterly*, no. 139 (September 1994): 714-30; Lucien Bianco, "French Studies of Contemporary China," *China Quarterly*, no. 142 (June 1995): 509-20; Mark Sidel, "The Re-emergence of China Studies in Vietnam," *China Quarterly*, no. 142 (June 1995): 521-40; Graham E. Johnson, "The True Strong: Contemporary Chinese Studies in Canada," *China Quarterly*, no. 143 (September 1995): 851-66; Lowell Dittmer, "Approaches to the Study of Chinese Politics," *Issues & Studies* 32, no. 9 (September 1996): 1-18; Kjeld Erik Brødsgaard, "Contemporary China Studies in Scandinavia," *China Quarterly*, no. 147 (September 1996): 938-61; Robert Ash, David Shambaugh, and Seiichiro Takagi, eds., *China Watching: Perspectives from Europe, Japan and the United States* (New York: Routledge, 2007); Jae Ho Chung, "Studies of Contemporary Chinese Politics in Korea: An Assessment," *China Quarterly*, no. 194 (June 2008): 395-413; Allen Carlson et al., eds., *Contemporary Chinese Politics: New Sources, Methods, and Field Strategies* (New York: Cambridge University Press, 2010); Melanie Manion, "Using All Tools in Our Toolbox? The Study of Chinese Politics by Western Scholars" (paper presented at the Keio Annual Symposium on Contemporary Chinese Politics, Center for Contemporary Chinese Studies, Keio University, Tokyo, December 15, 2012); Jing Vivian Zhan, "Studying Chinese Politics in Hong Kong: Resources, Methodologies and Prospects" (paper presented at the Keio Annual Symposium on Contemporary Chinese Politics, Center for Contemporary Chinese Studies, Keio University, Tokyo, December 15, 2012).

²The author found only one work in English addressing this topic and four in Chinese. See

A good starting point to depict the historical trajectory of China studies in Taiwan is to pinpoint the changing role of the Institute of International Relations (IIR). The IIR, established in 1953, has been one of the largest research institutes for China studies and international relations in Taiwan.³ In spite of the decrease in research manpower after the mid-1990s, the IIR remains a key academic networking locus that is worthy of attention due to shared work experiences in the IIR. Many scholars of China studies and international relations in different departments and graduate institutes of National Chengchi University (NCCU) and even in other universities and Academia Sinica are former IIR research fellows.

In the past six decades, the role of the IIR has shifted from that of a government think tank, monopolizing China studies and serving the top brass jointly with other state-dominated research units, to a competitor for

Tai-chun Kuo and Ramon Myers, *Understanding Communist China: Communist China Studies in the United States and the Republic of China, 1949-1978* (Stanford, Calif.: Hoover Institution Press, Stanford University, 1986); Kai-huang Yang, "Taiwan 'Zhongguo dalu yanjiu' zhi huigu yu qianzhan" (Retrospects and prospects of mainland China studies in Taiwan), in *Mairu ershiyi shiji de zhengzhixue* (Political science in the 21st century), ed. Szu-yin Ho and Yu-shan Wu (Taipei: Zhongguo zhengzhi xuehui, 2000), 527-51; Jieh-min Wu, Chih-jou Chen, and Ming-chi Chen, "Kua haixia xin shehui yanjiu: Taiwan zhi Zhongguo yanjiu dianfan gengxin yu xinxing lingyu" (New social research across the Taiwan Strait: paradigm renewals and burgeoning fields in China studies in Taiwan), *Dangdai Zhongguo yanjiu tongxun* (Newsletter of contemporary China studies), no. 9 (January 2008): 12-33; Hong-yuan Chang and Tsung-yi Lee, "'Zhongguo yanjiu' zai Taiwan: yanjiu tizhi de fazhan yu bianqian" (China studies in Taiwan: the developments and changes of research institutions), in *Cong linmo dao fansi: woguo shehui kexue boshi dui oumei zhishi yu tizhi de huiying* (From imitation to introspection: reflections of Taiwanese doctors of philosophy in social sciences on European and American academic knowledge and institutions), ed. Chih-yu Shih (Taipei: Hanlu, 2005), 251-82; Hsin-hsien Wang, "Taiwan Zhongguo zhengzhi yanjiu de xipu: fangfalun yu yiti fenxi" (The pedigree of mainland China studies in Taiwan: an analysis of methods and issues) (paper presented at the Keio Annual Symposium on Contemporary Chinese Politics: In Search of New Research Strategies with Japanese Characteristics, Center for Contemporary Chinese Studies, Keio University, Tokyo, December 15, 2012).

³The Chinese name of the IIR was *Guoji guanxi yanjiuhui* (國際關係研究會, Research Association of International Relations) when it was founded in April 1953. This name was changed to *Zhonghua minguo guoji guanxi yanjiusuo* (中華民國國際關係研究所, the Institute of International Relations of the Republic of China) in 1961. The Institute was then renamed *Guoji guanxi yanjiu zhongxin* (國際關係研究中心, the Institute of International Relations) when it was linked to National Chengchi University in July 1975. To facilitate discussion, this article will hereby refer to this institution by its current name, the Institute of International Relations.

academic achievement and policy influence in a pluralistic academic and political market. This process sheds light on the gradual shift of Taiwan's China studies from a focus on policy analysis and political indoctrination to one that is centered on scholarly research with policy analysis as its secondary aim. This article attempts to examine the marked transition of the IIR across three dimensions: the IIR's relationship with the state, the educational backgrounds of IIR research fellows, and the editorial policy of major IIR journals. These changes in the IIR reflect some important developments—though surely not all—in the entire China studies field in Taiwan: the emergence of area studies independent of state domination, an emphasis on foreign PhD training, and the differentiation of academic research and policy analysis. This article further argues that the dynamics of such a transformation primarily come from generational replacements of scholars on the one hand, and the amelioration of cross-Taiwan Strait relations and political and educational developments in Taiwan on the other. These factors have also reshaped the China studies field.

This article is composed of five sections. The first section focuses on the general traits of Taiwan's China studies from the early 1950s to the mid-1980s, and the second section addresses the rise of the IIR as a government think tank in the same period. The focus of the third section is the generational shift of scholars in the China studies field and political changes in Taiwan from the mid-1980s to the mid-1990s. In the fourth section, this article moves to discuss the generational and political tensions in the IIR caused by changes in the political and educational environment during this period. In the last section, both the traits of China studies from the mid-1990s to the present and the challenges that the IIR has encountered will be discussed.

China Studies at the Beginning: Fighting against the Communist Rebels

Before addressing the changing role of the IIR over the last several decades, it is crucial to present the developmental stages of China studies

in Taiwan in order to depict the political and educational environment that the IIR has faced in different periods of time and its adaptation to these environmental changes. Using the generational replacement of scholars and major political and academic events as criteria, this article divides the development of China studies in Taiwan into three stages: communist rebel studies (匪情研究, early 1950s to mid-1980s), Chinese communist studies (中共研究, mid-1980s to mid-1990s), and contemporary China studies (當代中國研究, mid-1990s to the present).⁴ Changes in scholarly generations usually lead to a shift in the research paradigm of a field in terms of research mission, research focus, methods and data sources, and standards of performance evaluation, thereby serving as good demarcation points. Political and academic events are also important to the definition of developmental stages because they may trigger or accelerate the process of paradigm shift. Of course, these divisions are relative rather than definitive, owing to the gradual and interweaving replacement of scholarly generations, as well as the continuous nature of changes in the political and academic climate.

During the communist rebel studies period, the primary attribute of China studies in Taiwan was its classification as official knowledge that contained elements of government intelligence. The China studies field was tasked with the policy needs of “combating the communist rebels” (對匪鬥爭), enemy situation analysis and domestic political indoctrination, in contrast to the academic research of today.⁵ Guided by these policy needs, research themes during this period were primarily centered on Chinese Communist Party (CCP) political elites and other political issues, although they also touched on economics, culture and education, communist theory, CCP history, and the People’s Liberation Army (PLA).⁶

⁴The four Chinese articles cited in footnote 2 also divide the development of China studies in Taiwan into several periods. The author’s periodization of the three stages differs slightly from theirs.

⁵Yang, “Taiwan ‘Zhongguo dalu yanjiu’ zhi huigu yu qianzhan,” 531-34.

⁶Kuo and Myers, *Understanding Communist China*, 82; Yang, “Taiwan ‘Zhongguo dalu yanjiu’ zhi huigu yu qianzhan,” 531.

In this period, only specific state agencies were authorized to read documents and information from mainland China and to perform relevant policy research, while ordinary citizens were prohibited from doing so. These agencies included the National Security Bureau (國家安全局, NSB), the Investigation Bureau (調查局), the Military Intelligence Bureau (軍事情報局), and the Second and the Sixth Divisions of the Central Committee of the Kuomintang (KMT) (中國國民黨中央委員會第二組、第六組), among which the latter two were merged and renamed the Department of Mainland China Affairs (大陸工作會) in 1972.

The China studies scholars of this period were usually referred to as communist rebel affairs experts (匪情專家). The majority were either defected CCP cadres or KMT and government officials who had been engaged in the fight against the communists long before 1949.⁷ These specialists usually worked in the state agencies mentioned above.⁸ Although lacking training in social science methodology, they were experienced practitioners who were good at intelligence analysis, and were relatively successful in correctly understanding and predicting major events in mainland China.⁹ In terms of research methods, China studies experts in

⁷The former group included Warren Kuo (郭華倫), Yao Meng-hsuan (姚孟軒), Liu Mao-nan (劉懋柵) and others. Some of the latter group were Lee Ten-ming (李天民), Chachi Szuchin (札奇斯欽), Yin Ching-yao (尹慶耀), and Chu Wen-lin (朱文琳). See “Introduction to Our Division” (本所簡介), the Chinese Politics Division of the IIR, <http://iir.nccu.edu.tw/chinapolitics/introduction.htm>.

⁸For instance, Warren Kuo, Yao Meng-xuan, Tseng Yung-hsien (曾永賢), and Wang Chang-ling (王章陵) came from the Investigation Bureau; Hsiang Nai-kuang (項迺光), Hsuan Mo (玄默, formal name She Yan-miao, 佘延苗), and Chang Chen-pang (張鎮邦) were from the Military Intelligence Bureau. See Yung-hsien Tseng, dictation, *Cong zuo dao you liushi nian: Zeng Yong-xian xiansheng fangtanlu* (60 years from left to right: recorded interviews with Mr. Tseng Yung-hsien) (Taipei: Academia Historica, 2009), 104-7, 131, 190-91; Ming-yi Wang, *Bu queding de haixia: dang Zhonghua Minguo pengshang Zhonghua Renmin Gongheguo* (Strait of uncertainty: when the Republic of China encounters the People's Republic of China) (Taipei: Shibao, 1992), 58; Chang-ling Wang, “Wang Zhang-ling” (Wang Chang-ling), The Research and Education Center for China Studies and Cross Taiwan Strait Relations, Department of Political Science, National Taiwan University, September 2009, <http://politics.ntu.edu.tw/RAEC/comm2/InterviewTWang.doc>.

⁹Kuo and Myers, *Understanding Communist China*, 64-83; Yu-min Shaw, *Cisheng buyu: wo de Taiwan, Meiguó, Dalu suiyue* (Enduring this life: my years in Taiwan, the United States and Mainland China) (Taipei: Lianjing, 2013), 234.

this period read intelligence reports, notes from interviews with mainland refugees, official documents and other mainland China publications (such as periodicals, news reports, radio broadcasts and pictures), observation notes from those who visited China, and information from other countries.¹⁰

The policy-oriented nature of China studies in this period also led to distribution restrictions on China studies publications. The analyses of these experts were rarely publicly circulated in the 1950s.¹¹ Some of their analyses became available thereafter in periodicals focusing on issues related to mainland China or comparative communism, such as *Zhongguo dalu yuekan* (中國大陸月刊, Mainland China Monthly), *Feiqing yanjiu* (匪情研究, Studies on Chinese Communists), *Wenti yu Yanjiu* (問題與研究, *Issues and Studies*, Chinese version), *Issues & Studies*, *Feiqing yuebao* (匪情月報, Chinese Communist Affairs Monthly), and *Gongdang wenti yanjiu* (共黨問題研究, Studies in Communism). These periodicals, published in different years throughout this period, were all either directly or indirectly affiliated with the ruling KMT or the three government intelligence agencies mentioned above.

In the second half of this period, dramatic changes in international circumstances shook Taipei's international status as the legal government of China and thereby gradually undermined the communist rebel studies research paradigm, which emphasized "communism shall be defeated,

¹⁰Warren Kuo, *Zhonggong wenti lunji* (CCP issues collectanea), enlarged edition (Taipei: Institute for International Relations, 1982), 391, 394-95; Kuo and Myers, *Understanding Communist China*, 6. A typical case of mainland China publications is the book entitled *Mao Zedong sixiang wansui* (Long Live Mao Zedong Thought), which reflected Mao's ideas in his late years. Editorial Committee of the Memoirs of Professor Warren Kuo, *Guo jiaoshou qianhui xiansheng zhuisilu* (The memoirs of Professor Warren Kuo) (Taipei: the Graduate Institute of East Asian Studies, National Chengchi University, 1985), 84.

¹¹For example, the IIR published *Wenti yu Yanjiu* in April 1956 and *Feiqing yuebao* in January 1958. The former remained a closed circulation journal until October 1961 (vol. 1, no. 1, reassigned serial numbers); the latter began allowing foreign subscriptions in February 1966 (vol. 9, no. 1) and officially announced public distribution in July 1988 (vol. 31, no. 1). See "History," IIR website, <http://iir.nccu.edu.tw/index.php?include=aboutus&mode=history>; Hui-lin Liu, "Lun 'Zhonggong yanjiu' de tujing ji zhongxi zai yanjiushang de fenqi" (On the approaches of "CCP studies" and the divergence in research methods between the West and the East), *Dongya jikan* (East Asia Quarterly) 7, no. 4 (April 1976): 53-54.

tyranny shall perish” (反共必勝，暴政必亡). These challenges included Taipei’s withdrawal from the United Nations in 1971, Deng Xiaoping’s (鄧小平) economic reforms in 1978, the establishment of diplomatic relations between the US and the People’s Republic of China (PRC) in 1979, and the PRC’s new Taiwan policy in 1979, which called for “peaceful reunification and *one country, two systems*” (和平統一，一國兩制). In order to extend Taipei’s international influence and improve civilian understanding of the CCP’s political propaganda, Taiwan’s China studies began to move towards more public transparency. Beginning in the 1970s, the IIR eagerly strengthened academic diplomacy, which will be discussed in the next section. In the mid-1970s, IIR research fellows supplied instructors for mainland China studies courses at National Taiwan University, NCCU and several other universities in order to strengthen “ideological education” and “knowing the enemy.”¹²

The research paradigm of communist rebel studies faced more challenges after the 1970s. Starting in the early 1970s, facing questions from local and foreign scholars, leading experts of communist rebel studies began to illustrate their research methods in order to defend the results of their analyses.¹³ Many American China studies scholars, who usually had strong social science backgrounds and maintained a value-free attitude in their research, viewed the analyses done by these communist rebel specialists as suspect, partly due to their usage of emotive and negative anti-communist terms to describe the CCP and its leaders and partly due to their lack of social science research methods.¹⁴ In response, Warren Kuo defined their oft-employed methods as the interactive usage of “analytical,

¹²Kuo, *Zhonggong wenti lunji*, 398; Editorial Committee of the Memoirs of Professor Warren Kuo, *Guo jiaoshou qianhui xiansheng zhuisilu*, 121; Liu, “Lun ‘Zhonggong yanjiu’,” 55.

¹³For instance, Warren Kuo, “Guanyu yanjiu ‘Zhongguo dalu wenti zhi fangfa’” (On mainland China studies research methods) (paper presented at the Second Sino-American Conference on Mainland China, the Institute for International Relations, National Chengchi University, June 14, 1972). During the conference Kuo responded to former American ambassador to South Korea Richard Walker’s sixteen questions about research methods.

¹⁴Kuo and Myers, *Understanding Communist China*, 11.

inductive, deductive, comparative, and historical” methods, along with the simultaneous usage of the dialectical method.¹⁵

However, these efforts did not prevent the eventual breakdown of this research paradigm. After the US and the PRC established diplomatic relations in 1979, both sides signed cultural and academic exchanges. American scholars could thereby travel to mainland China to do field-work; however, scholars from Taiwan did not have the same opportunity. This change diminished the level of dependency that American scholars had on Taiwan's China studies, leading to greater discrepancies in research methods and information sources on both sides.¹⁶ With the arrival of the 1980s, some Taiwanese political scientists studying abroad in the US, where they received training in social science methodology, called into question the research methods of communist rebel studies. In June 1982 *Shibao zazhi* (時報雜誌, China Times Monthly) published Warren Kuo's "Research methods for mainland China issues,"¹⁷ and held a forum on China studies research methods in July of the same year.¹⁸ In September, Lin Tse-min's (林澤民) "Research methods and models in Chinese communist studies" was published in the same magazine, and was critical of the research methods adopted by experts on communist rebel affairs.¹⁹ Lin criticized Warren Kuo's "analytical, inductive, deductive, comparative, and historical method" as, in reality, simply the traditional

¹⁵See Kuo, *Zhonggong wenti lunji*, 392-93; Warren Kuo, "Zhongguo dalu wenti de yanjiu fangfa" (Research methods for mainland China issues), *Shibao zazhi* (China Times Monthly) (Taipei), June 6, 1982, 57-58.

¹⁶Tseng, *Cong zuo dao you liushi nian*, 174-75; Yang, "Taiwan 'Zhongguo dalu yanjiu' zhi huigu yu qianzhan," 536, 540.

¹⁷Kuo, "Zhongguo dalu wenti de yanjiu fangfa," 57-58.

¹⁸Forum participants included Warren Kuo, Tsao Po-i (曹伯一), Yin Ching-yao, Chao Hsien-yun (趙先運), Yuan Song-shi (袁頌西), and Alexander Ya-li Lu (呂亞力). The first four are typical experts on communist rebel affairs, while the latter two are returnee scholars with specialities in methodology. See Chu-luen Mao, "'Zhongguo dalu wenti de yanjiu fangfa' zuotanhui" (Forum on the research methods of the study of mainland China issues), *Shibao zazhi* (China Times Monthly) (Taipei), July 4, 1982, 57-62.

¹⁹Tse-min Lin, "Zhonggong yanjiu de fangfa yu moshi" (Research methods and models in Chinese communist studies), *Shibao zazhi* (China Times Monthly) (Taipei), September 12, 1982, 57-60.

“historical studies method.” This round of dialogues was a concrete example of the wane of the research paradigm of communist rebel studies.²⁰

The Rise of the IIR as a Government Think Tank (from the Early 1950s to Mid-1980s)

The rise of the IIR typically reflects the policy-oriented nature of China studies in the communist rebel studies period. First of all, the IIR was closely linked to the state and was indebted to Chiang Kai-shek (蔣介石) and Chiang Ching-kuo (蔣經國) for its foundation and growth during its first thirty-five years of life. When the IIR was established in April 1953, it was actually an intelligence unit under the direct command of Chiang Ching-kuo and had a covert identity for internal use—the Informational Division of the Presidential Office (總統府資料組) or Yuanlu Research Office (遠廬研究室). The first director of the institute was Shao Yuling (邵毓麟), a former ambassador to Korea, and the directorship was transferred to Bu Daomin (卜道明), a former CCP member and a friend of Chiang Ching-kuo, in 1954. The IIR’s covert identity became the Policy Research Office (政策研究室) of the National Security Bureau after the foundation of the latter in 1955.²¹ Due to the hierarchical relationship between these two units, the IIR needed to acquire the NSB’s approval before carrying out its major decisions and activities.²² The state even arranged for preferred persons to hold posts in the IIR.²³ The IIR had an advisory commission during this period, including

²⁰Yang, “Taiwan ‘Zhongguo dalu yanjiu’ zhi huigu yu qianzhan,” 539.

²¹Anonymous author, “Taiwan zhengyao de yangchengsuo: jiekai ‘guoguan zhongxin’ de shenmi miansha (shang)” (A training ground for government dignitaries in Taiwan: lifting the mysterious veil of the Institute of International Relations [I]), *Zhongwai zazhi* (Kaleidoscope Monthly) (Taipei) 52, no. 4 (October 1992): 112.

²²For example, the IIR’s decision to publicly distribute *Wenti yu Yanjiu* in October 1961 obtained the approval of the head of the NSB in September of that year and received budget support from the bureau within the limit of NT\$ 25,000.

²³For example, Chiang Ching-kuo arranged for Warren Kuo to assume the deputy directorship of the IIR after the latter’s retirement from the Investigation Bureau in 1964. Tseng,

the minister of foreign affairs, minister of education, the director of the Government Information Office, NCCU's president and others. The commission annually discussed major IIR tasks and then the Executive Yuan allocated a budget to carry out these tasks.²⁴

The main functions of the IIR before its complete integration into NCCU in 1996 were to provide current position analyses and policy suggestions about mainland China and international politics to the state, particularly Chiang Kai-shek and Chiang Ching-kuo, and to promote Taipei's view on the PRC by engaging in international exchanges.²⁵ The institute also served as a springboard for scholars to become ranking officials in the state, particularly between the 1980s and the 1990s. An example of the IIR's policy suggestion function is the operation of two task teams from 1972 to 1975, one for foreign relations and the other for economic development, under the leadership of IIR director Han Lih-wu (杭立武), who served as the IIR director in this period.²⁶ Each task team convened every one or two weeks and wrote a policy report for Chiang Ching-kuo. Chiang told Han two years later, probably in 1974, that 95 percent of the policy suggestions from the economic development task team were accepted.²⁷ In fact, this task team was so influential that ranking economic technocrats criticized the IIR several times in Executive Yuan council meetings (行政院院務會議) for actions beyond its sphere of responsibility. The

Cong zuo dao you liushi nian, 106. The KMT also arranged for some political dissidents to be IIR research fellows such as Chen Guying (陳鼓應, 1973-1978), Li Ao (李敖, 1976-1977), Chen Shao-ting (陳少廷, 1986-1996). Peng Ming-min (彭明敏) refused a similar job arrangement offered by the KMT in 1966.

²⁴Shaw, *Cisheng buyu*, 235.

²⁵IIR Third Division, *91 xueniandu disansuo ziwo pingjian shouce* (The IIR Third Division self-assessment report of the 2002 academic year), Third Division, IIR, National Chengchi University (2002), 1; Shaw, *Cisheng buyu*, 234.

²⁶For more discussion of these two task teams and their policy contributions, see Ping Wang, *Hang Li-wu xiansheng fangwen jilu* (The reminiscences of Mr. Han Lih-wu) (Taipei: Institute of Modern History, Academia Sinica, 1990): 63-64; Funeral Committee for Mr. Han Lih-wu, *Hang Li-wu xiansheng jinian ji* (The commemorative collected works of Mr. Han Lih-wu) (Taipei: Funeral Committee for Mr. Han Lih-wu, 1992), 62-63, 114, 117-19.

²⁷Wang, *Hang Li-wu xiansheng fangwen jilu*, 63.

foreign relations task team was seemingly less influential than the first team, because Chiang's urgent concern was Taiwan's adaptation to the 1973 oil crisis, but still made policy suggestions on at least two issues: refusing the production of nuclear weapons and stalling the establishment of full diplomatic relations between the United States and the PRC. In 1975, Han dissolved these two task teams, suggested that Chiang put the IIR under the nominal jurisdiction of NCCU, and resigned his directorship. Han's directorship was succeeded by Tsai Wei-ping (蔡維屏), a professional diplomat who served as IIR director from 1975 to 1981.

The IIR also provided policy briefings (上呈報告) for internal circulation to the top brass. This mechanism originated from Chiang Kai-shek's instruction to the IIR in the 1950s—to assist the top leadership by systematically reading information from abroad and submitting analytical reports and suggestions to the top leadership on crucial current events overseas or in mainland China.²⁸ Although it is not possible for this article to fully assess the contributions of this mechanism due to the lack of transparency,²⁹ the limited existing literature has shown that the IIR indeed made some correct predictions about the PRC's major foreign military actions and political changes. For example, Warren Kuo (郭華倫), a leading expert on communist rebel affairs in the IIR, correctly predicted on public occasions the PRC's involvement in the Korean War in 1950 and the ouster of both the Gang of Four (四人幫) and Hua Guofeng (華國鋒) after the death of Mao Zedong (毛澤東) in the late 1970s.³⁰ The IIR also participated in the collective effort of denouncing the so-called

²⁸Shaw, *Cisheng buyu*, 236. The policy briefing mechanism came to an end in the mid-2000s.

²⁹The top brass and ranking officials of relevant ministries did not inform the IIR about their response to and subsequent actions following these policy briefings. Author's interview with former IIR director Chang King-yuh (張京育) on September 14, 2013. Chang served as IIR director from 1981 to 1984 and from 1987 to 1989.

³⁰See Editorial Committee of the Memoirs of Professor Warren Kuo, *Guo jiaoshou qianhui xiansheng zhuisilu*, 67, 101, 130, 110. Warren Kuo correctly predicted the fate of the Gang of Four before the death of Mao in a KMT meeting. See "Guo qianhui fenxi feiqing zhichu feibang zhengduo jichengquan" (Warren Kuo indicated communist rebels' struggles over political succession), *Lianhe bao* (United Daily) (Taipei), February 24, 1976, 2.

“Fairbank proposal” in the late 1960s,³¹ and served the state by giving internal speeches within the ruling KMT.³²

Additionally, the IIR engaged in academic diplomacy and political indoctrination in various ways. Due to the increasing difficulty for Taipei to maintain its international status as the only legal government for the whole of China, the KMT tasked the IIR to become a major instrument of academic diplomacy in the 1960s.³³ In February 1958, the IIR acquired the legal status of a non-governmental organization in order to facilitate the participation of scholars outside the intelligence circle in policy consultation. In January 1966, the IIR began to play the role of an information supply center, providing American scholars with official PRC documents, sometimes from intelligence sources, after translation into English. In January 1967, the KMT decided to make the IIR the sole officially-authorized center of international academic exchanges in China studies.³⁴ Wu Chen-

³¹In 1966, John King Fairbank, J. William Fulbright and others openly or implicitly advocated a change in US China policy to accept the PRC as a political reality in a series of Senate public hearings. This proposal was treated by the KMT as a major threat to its political survival and strong counter-attacks were launched in response. See Titus C. Chen, “The Cold War Origin of the Taiwan-U.S. Conference on Contemporary China: A Strange Legacy of Chen-Tsai Wu and John King Fairbank in Trans-Pacific China Studies” (paper presented at the International Conference on “Between Power and Knowledge: Think Tanks in Transition” for the Celebration of the 60th Anniversary of the Institute of International Relations, National Chengchi University, Taipei, April 11-12, 2013), 12-13.

³²Shaw Yu-min (邵玉銘), who served as IIR director from 1984 to 1987 and from 1994 to 1999, gave oral reports on the current situations of the PRC and international politics in the meetings of the KMT Central Committee Standing Committee twice a year. Shaw, *Cisheng buyu*, 250. Warren Kuo, Chang King-yuh, and Lin Bih-jaw (林碧炤) also gave speeches as IIR directors or deputy directors on the same occasions or in other KMT high-level meetings. Lin served as IIR director three times, from 1990 to 1994, from 2003 to 2004, and in 2005. *Lianhe bao*, “Guo qianhui fenxi feiqing”; “Miandui duobian shiju guoren ying geng tuanjie” (Our people should hold together tightly when facing changing environments), *Lianhe bao* (United Daily) (Taipei), August 4, 1988, 2; “Qi zhong neiding renshi tiaozheng” (Scheduled personnel reshuffling in the 7th plenum of the 14th CCP Central Committee), *Lianhe bao* (United Daily) (Taipei), December 27, 1990, 4; “Guoguan zhongxin Lin Bih-jaw zhuren: Zhonggong nantao bei gaibian” (IIR director Lin Bih-jaw indicated that the CCP could not escape from transition), *Lianhe bao* (United Daily) (Taipei), September 26, 1991, 4.

³³For more discussion of the KMT’s decisions about the expansion of the role of the IIR, see Chen, “The Cold War origin of the Taiwan-U.S. Conference on Contemporary China,” 10-19.

³⁴Dongyang Zheng, “Kuomintang zhongyang dangxiao jinxi” (Past and present of the Kuo-

tsai (吳俊才), who served as the IIR director from 1964 to 1972, played a critical role in founding the framework for these tasks. The expansion of the IIR's function and organization in turn upgraded the political importance of the institute, outweighing the other intelligence units in Taiwan.³⁵

In order to fulfill the above function, the IIR published many books on the PRC in this period. Some classic works include *Zhonggong renming lu* (中共人名錄, Chinese Communist Who's Who) in 1967 and *Zhonggong shi lun* (中共史論, On CCP History) in 1969.³⁶ *Chinese Communist Who's Who*, the English version of *Zhonggong renming lu*, was published in 1970. These publications were very helpful for outsiders to the CCP's past history and political elites when first-hand information about mainland China was sparse before the late 1970s. In 1971, the IIR set up a branch in Tokyo for intelligence exchanges about the PRC. However, due to the nature of official knowledge in this period of China studies, visiting foreign scholars could not copy materials in the IIR library without prior permission.³⁷ IIR research fellows' right to duplicate their own research papers was also limited.³⁸

International conferences and forums provide another platform for the IIR to carry out its function of academic diplomacy. The IIR has co-sponsored series of annual conferences with foreign think tanks in the United States (since 1970), Japan (since 1971), South Korea (since 1980) and Europe (since 1984), respectively. Although these mechanisms have become ritualized and have lost their policy significance in recent years,

mintang Central Party School), *Xin hua'ao bao* (New Correio Sino-Macaense) (Macau), unknown date, <http://www.waou.com.mo/detail.asp?id=41970>; Liu, "Lun 'Zhonggong yanjiu' de tujing ji zhongxi zai yanjiushang de fenqi," 54; Kuo and Myers, *Understanding Communist China*, 9.

³⁵Chen, "The Cold War Origin of the Taiwan-U.S. Conference on Contemporary China," 16.

³⁶The subsequent revised versions of *Zhonggong renming lu* were published in 1978, 1983, 1989, and 1999, respectively. Warren Kuo played a key role in the first three versions of this reference book. He is also the author of *Zhonggong shi lun*.

³⁷Editorial Committee of the Memoirs of Professor Warren Kuo, *Guo jiaoshou qianhui xiansheng zhuisilu*, 117.

³⁸Yang, "Taiwan 'Zhongguo dalu yanjiu' zhi huigu yu qianzhan," 533.

they used to be an essential part of Taipei's diplomatic actions. For example, the decision to hold the Sino-American conference on the problems of mainland China was the KMT's last offensive of persuasion/propaganda directed at the international community.³⁹ By means of this platform, Taipei showed its capability to collect information about the PRC and to express its view. Another example is the Taipei-Seoul Forum. The forum served as an unofficial dialogue platform for Taipei and carried out policy functions particularly after the breakdown of diplomatic relations between the two countries in 1992. The restoration of direct flights between Taiwan and South Korea in 2004 was an accomplishment of the continuous dialogue in the forum over the years.⁴⁰

In addition to these series of conferences, the IIR often addressed Taipei's view on the PRC in many international events. For example, in 1985, then IIR director Shaw Yu-min presented a paper about the future of Taiwan in an Atlantic Council meeting and submitted a report about the membership of the Chinese Association of Political Science (Taipei) at the 13th International Association of Political Science annual meeting.⁴¹ The IIR often sent its research fellows overseas for conferences, research and visits, and also invited and accommodated foreign scholars, politicians and reporters.⁴²

Periodicals were also a tool for the IIR to carry out its function. During Bu Daomin's tenure as IIR director (1954-1964), the institute published its three major periodicals *Wenti yu Yanjiu* in 1956, *Feiqing yuebao* in 1958, and *Issues & Studies* in 1962.⁴³ These periodicals did

³⁹Chen, "The Cold War Origin of the Taiwan-U.S. Conference on Contemporary China," 19.

⁴⁰Hwei-luan Poong, "Navigating through the Sea of Westphalia Diplomacy: Role of Think Tank in Taipei-Seoul Forum" (paper presented at the International Conference on "Between Power and Knowledge: Think Tanks in Transition" for the Celebration of the 60th Anniversary of the Institute of International Relations, National Chengchi University, Taipei, April 11-12, 2013), 3.

⁴¹Shaw, *Cisheng buyu*, 238-44.

⁴²The IIR accommodated about 500 foreign guests in 1985. Shaw, *Cisheng buyu*, 234.

⁴³The idea of an English periodical originally came from Chiang Kai-shek's speech to IIR research fellows on September 19, 1953. He asked the IIR to publish a distinguished periodical on a par with *Foreign Affairs*. Philip Hsiao-pong Liu, "Assembling Scholars

not call for manuscripts until the 1960s, with publication of manuscripts from academia only regularly emerging after the late 1980s.⁴⁴ Because their existence in this period was based on policy analysis, articles published in these periodicals were required to echo the anti-communism and anti-Taiwan independence policy of the KMT and did not go through the anonymous peer review process.

In 1968, under the authorization of Chiang Kai-shek, the IIR collaborated with NCCU to found the Graduate Institute of East Asian Studies (東亞研究所, GIEAS), the first graduate institute in Taiwan focusing on mainland China affairs, in order to nurture a younger generation of China studies scholars.⁴⁵ A typical example to illustrate the interweaving relationship between the IIR and GIEAS is Wu Chen-tsai. He was director of the IIR from 1964 to 1972 while concurrently serving as the founding director of GIEAS from 1968 to 1972. GIEAS offered a master's degree program in 1968 with a primary focus on training talents in CCP history, dialectics, ideology and international communist movements; thus, scholars trained in this graduate institute had a strong grasp of official CCP documents.⁴⁶ The IIR supported GIEAS by providing course instructors, funds and other logistic support services, resulting in a natural linkage between GIEAS and the NSB.⁴⁷ The IIR also annually recruited several GIEAS

in the Face of the Enemy: The Prequel to the Institute of International Relations, 1937-1975" (paper presented at the International Conference on "Between Power and Knowledge: Think Tanks in Transition" for the Celebration of the 60th Anniversary of the Institute of International Relations, National Chengchi University, April 11-12, 2013, Taiwan), 4.

⁴⁴This is the author's observational conclusion after examining the authorship and the various versions of the call-for-manuscripts notices over the years in these periodicals. IIR research fellows are excluded from the scope of academia because of the direct affiliation of the IIR with the NSB in this period.

⁴⁵Editorial Committee of the Memoirs of Professor Warren Kuo, *Guo jiaoshou qianhui xiansheng zhuisilu*, 69; Zheng, "Kuomintang zhongyang dangxiao jinxi." The Chinese Culture University established the Graduate Institute for Mainland China Studies in 1972—the second one in Taiwan. It was merged with the Graduate Institute of Sun Yat-sen Thoughts in 2009.

⁴⁶Because of the program's focus on party history and the privilege of access to classified materials about mainland China in the IIR, GIEAS students read a number of important official CCP documents, affording them an understanding of CCP documents and topics.

⁴⁷GIEAS therefore had many more resources than the other departments and graduate

alumni as research fellows until the early 1990s.⁴⁸

In July 1975, as a decision made by Chiang Ching-kuo, the IIR became nominally under the jurisdiction of NCCU but in reality operated independently of the university in order to dilute the IIR's relationship with the NSB for the sake of carrying out academic diplomacy more conveniently.⁴⁹ The IIR continued to receive funds from the NSB and engage in joint research with the other intelligence-related agencies in the government, the military, and the KMT,⁵⁰ although the institute ceased to function as the Policy Research Office of the NSB and many IIR staff members with no research connections returned to the NSB.⁵¹ The IIR maintained close ties with the NSB until its full amalgamation into NCCU in 1996.

China Studies in Transition: Generational Shift and Political Changes

Taiwan's China studies and the IIR underwent a great transformation during the Chinese communist studies period from the mid-1980s to the

institutes in NCCU, such as free transportation for faculty members, and article honorarium for *Dongya jikan*, GIEAS' official journal. "Taiwan zhengyao de yangchengsuo (shang)," 112; Huan-ching Chang, "Chang Huan-ching jiaoshou koushu lishi shougao" (Manuscript of Chang Huan-ching's oral history), the Research and Education Center for China Studies and Cross Taiwan Strait Relations, Department of Political Science, National Taiwan University, October-December 2008, <http://raec.igd.tw/act/tw-9.doc>; Ho-cheng Jui, "Rui He-zheng Zhongguo yanjiu jingyan koushu lishi fangtan jilu" (Minutes from an interview with Ho-cheng Jui on his China studies experiences), the Research and Education Center for China Studies and Cross Taiwan Strait Relations, Department of Political Science, National Taiwan University, October 2008, <http://raec.igd.tw/act/tw-15.doc>.

⁴⁸Chang and Lee, "'Zhongguo yanjiu' zai Taiwan," 255.

⁴⁹Chi-po Lin, "Cong muhou xiance dao duoyuan fasheng: Taiwan zhiku baihua qifang" (From providing policy suggestions behind the scenes to plural voices: the pluralization of think tanks in Taiwan), *Taiwan guanghua zazhi* (Taiwan Panorama Magazine) (Taipei) (April 2002): 3; Wang, *Hang Li-wu xiansheng fangwen jilu*, 64.

⁵⁰Anonymous author, "Taiwan zhengyao de yangchengsuo: jiekai 'guoguan zhongxin' de shenmi miansha (xia)" (A training ground for government dignitaries in Taiwan: lifting the mysterious veil of the Institute of International Relations [II]), *Zhongwai zazhi* (Kaleidoscope Monthly) (Taipei) 52, no. 5 (November 1992): 132.

⁵¹Liu, "Assembling Scholars in the Face of the Enemy," 7.

mid-1990s, representing a transitional stage moving from policy analysis toward academic research. While some scholars continued to conduct policy analyses, others found increased leeway to pursue their research without political intervention, and their research outcomes also gradually distanced themselves from the predestined conclusion of “communism shall be defeated, tyranny shall perish.” This division of labor became increasingly obvious as the stage progressed. In addition to the international changes this article has mentioned earlier, generational replacement of scholars, the thawing of cross-strait relations, Taiwan’s democratization, and innovation in government research and education policy also contributed to this transition.

This stage marked the first generational shift in the field. In 1981 GIEAS opened its PhD program. The program’s PhD students began graduating in the mid-1980s, finding employment at various universities and research institutions in Taiwan and other countries, including the IIR.⁵² With GIEAS the only China studies program that offered PhD training, their graduating PhD holders became the main force behind Taiwan’s China studies field.⁵³ Many of these scholars are still active in academia, media or policy consultation today. A few PhD-holding returnees from abroad also entered this field, some of whom had obtained master’s degrees from GIEAS.⁵⁴ This generational shift signaled the increasing demand for scholars to hold PhD degrees. The adaptation of the revised University Law (大學法) in 1994, which required a doctoral degree as a

⁵²A Korean national received the first PhD from GIEAS in 1984. The next PhD graduates were Lee Ying-ming (李英明) (former GIEAS professor and current vice principal of China University of Science and Technology) and Chi Mao-chi (齊茂吉) (professor in the Graduate Institute of History, National Central University). They obtained their doctoral degrees in 1985.

⁵³Some examples are Shih Tse-hsiung (施哲雄), Chao Chun-shan (趙春山), Wu An-chia (吳安家), Fu Feng-cheng (傅豐誠), Yang Kai-huang (楊開煌), Chang Jung-feng (張榮豐), Wei Ai (魏艾), Chi Mao-chi, Li Ying-ming, Lo Shiao-nan (羅曉南), Yu Yu-lin (俞雨霖), Sung Kuo-chen (宋國誠), Liu Sun-chi (劉勝驥), Chen Te-sheng (陳德昇), Kao Huei (高輝), and Chang Wu-ueh (張五岳).

⁵⁴Some examples are Chiu Kun-shuan (邱坤玄), Chao Chien-min (趙建民), Shao Zong-hai (邵宗海), Ming Chu-cheng (明居正), and Shih Chih-yu (石之瑜). Chao is a GIEAS alumnus.

primary condition for appointment to assistant professor, reinforced this trend of personnel recruitment. At the same time, the aging experts of communist rebel studies began to withdraw from their posts, either due to retirement or death.⁵⁵

This stage also experienced dramatic changes in cross-Taiwan Strait relations and Taiwanese domestic politics. On July 16, 1981, Pai Wanhsiang (白萬祥), director of the KMT's Department of Mainland China Affairs (大陸工作會), declared that Taiwanese officials would refer to mainland China as the "Chinese communist regime" (中共政權) and no longer use derogatory terms such as "communist rebels" in the public arena.⁵⁶ In October 1987 civilian travel to the mainland to visit relatives was opened, officially putting an end to the Three No's Policy (三不政策) (no contact, no compromise, and no negotiation). Increasingly frequent contact between both sides of the Taiwan Strait brought more information from the mainland, and also toned down the monopoly of the IIR and other state agencies over China studies.⁵⁷

These developments undoubtedly had a profound influence on the research topics, methods, and publications of Taiwan's China studies. As China's reform progressed, research topics in the field became more diverse. Besides traditional political and personnel research, topics dealing with socio-economic changes such as state-owned enterprise reform, social stratification, township and village enterprises, and grassroots politics also emerged, expanding the China studies field and moving towards typical area studies research.

Meanwhile, scholars of the younger generation used public information more frequently and extensively than their predecessors. Benefiting from the PRC's reform, the environment for information acquisition had

⁵⁵Kuo and Myers, *Understanding Communist China*, 7. For example, Warren Kuo, a former vice director of the IIR, and acting director of GIEAS, passed away in 1984.

⁵⁶Xin Xue and Jia-yu Tang, "Jiang Jing-guo dui Taiwan wenti de sikao yu jueze" (Chiang Ching-kuo's deliberations and decisions regarding Taiwan), *Dangshi zonglan* (A panoramic view of party history) (Hefei), 2004, no. 4 (April): 14.

⁵⁷Yang, "Taiwan 'Zhongguo dalu yanjiu' zhi huigu yu qianzhan," 538-41.

relatively fewer restrictions than before. Information acquisition channels also gradually became more diverse, resulting in a large decrease in the dependency on intelligence sources. Although the importance of social science methodology progressively increased, experience in the PRC and personal contacts continued to play a definite role. However, because they lacked their predecessors' experience of personal contact with CCP elites, they were unable to fully carry on the research methods of the previous generation.⁵⁸ Accordingly, alternative information sources became important to their research.

In this period, Taiwan underwent political turbulences caused by democratization. After the death of Chiang Ching-kuo in January 1988, Lee Teng-hui (李登輝) immediately succeeded Chiang as the president, but in the process of consolidating power, he faced internal political challenges within the ruling KMT in a series of critical events, such as the takeover of the KMT chairmanship in 1988, the nomination of the KMT presidential and vice presidential candidates in 1990, and the presidential election in 1996. These factional conflicts within the KMT had a strong and permanent impact on the role of the IIR as a government think tank. The next section will discuss this impact in detail.

The IIR Entangled in Political and Generational Tensions (from the Mid-1980s to Mid-1990s)

The IIR underwent a dramatic transformation from the mid-1980s to the mid-1990s in terms of its relationship with the state, the educational backgrounds of research fellows, and the editorial policy of its major journals. First of all, the IIR cut off its institutional ties with the NSB and fully merged with NCCU in 1996, symbolizing the termination of its role as a government think tank. In the first several years after the death

⁵⁸Kuo-ning Hsiang, "Dalu wenti yanjiu de yinyou" (Hidden worries in the study of the problems in China), *Lianhe bao* (United Daily) (Taipei), June 17, 1985, 2.

of Chiang Ching-kuo in 1988, the IIR continued to function as before—offering President Lee Teng-hui current situation analyses and policy suggestions and engaging in academic diplomacy.⁵⁹ Lee's long-term ties with the IIR began in the early 1970s.⁶⁰ He visited the IIR at least three times in the period between 1985 and 1989 for different reasons and required the IIR to provide him with weekly reports on the most current political and economic trends in the PRC and Hong Kong.⁶¹ Some IIR-affiliated scholars such as Chang King-yuh, Lin Bih-jaw, Su Chi (蘇起), Pi Ying-hsien (畢英賢), Chao Chun-shan, Tseng Yung-hsien, and Wu An-chia joined the research task teams which aimed to provide Lee

⁵⁹For example, Lee consulted the IIR's opinions when Taipei considered opening trade relations with the Soviet Union in 1989. Yun-tsung Shen and Wen-ching Weng, "Jinnang li youmeiyou miaoji? Li Deng-hui de minjian zhiku" (Good cards up his sleeve? Lee Teng-hui's civil think tanks), *Xinxinwen* (The Journalist) (Taipei), May 21, 1990, 75. With the support of the Ministry of Foreign Affairs, the IIR became a member of the Council for Security Cooperation in the Asia Pacific (CSCAP) in 1994 in order to participate in dialogues between think tanks in this region. Yu-li Hu, "Guoguan zhongxin yi quanguo weiyuanhui mingyi shenqing jiaru yatai anhehui" (The IIR applied for CSCAP membership in the name of the National Committee), *Lianhe bao* (United Daily) (Taipei), November 8, 1993, 4. For more examples of academic diplomacy carried out by the IIR in this period, see Shaw, *Cisheng buyu*, 382-87.

⁶⁰Lee was an adjunct IIR research fellow and GIEAS faculty member from 1971 to 1978 and was a member of the IIR economic development task team during Han Lih-wu's tenure as IIR director. Shaw, *Cisheng buyu*, 263; Shen and Weng, "Jinnang li youmeiyou miaoji?" 75; Shih-yao Chen and Chen-chung Ho, "Weilai jiang lixi guotong huiyi, 12 wei yanjiu weiyuan mingdan jixiao" (The list of 12 research committee members of the National Unification Council was announced and they will attend the council meetings without voting rights), *Lianhe bao* (United Daily) (Taipei), October 8, 1990, 2; Kung-ping Hsieh, "zhang jing-yu neiding churen zhengwu weiyuan" (Chang King-yuh will be appointed as a minister without portfolio), *Lianhe bao* (United Daily) (Taipei), March 3, 1994, 4.

⁶¹"Li fuzongtong xunshi guoguan zhongxin" (Vice President Lee made an inspection tour of the IIR), *Lianhe bao* (United Daily) (Taipei), August, 7, 1985, 2; "Huaren diqu fazhan jingyan yantaohui zuo jiemu" (The Conference on the Development Experiences in Ethnic Chinese Regions opened yesterday), *Lianhe bao* (United Daily) (Taipei), December, 25, 1987, 2; "Zhong Mei heban zhonghua minguo minzhuhua yantaohui" (Taiwan and the United States co-sponsored the conference on the democratization of the ROC), *Lianhe bao* (United Daily) (Taipei), January, 9, 1989, 2; Shaw, *Cisheng buyu*, 263; Wang, *Bu queding de haixia*, 105; Editorial Committee of the Commemorative Collected Works of Mr. Wu Chen-tsai, *Aiguo yu aicai: huainian Wu Juncai xiansheng wenji* (For the love of our country and talent: the commemorative collected works of Mr. Wu Chen-tsai) (not formally published, 1997), 133-35, 147.

with political consultations.⁶² In fact, Chang King-yuh organized Lee's brain trust when the latter was vice president in the late 1980s and Lin Bih-jaw was responsible for forming a new team for Lee in the mid-1990s.⁶³ Lee was also involved in the attempt to strengthen the institute.⁶⁴ Not surprisingly, Lee revealed once in 1990 that the IIR was one of his four brain trusts.⁶⁵ Additionally, five IIR directors and deputy directors became ranking officials in the government and the KMT years later, such as Chang King-yuh, Shaw Yu-min, Lin Bih-jaw, Wu An-chia and Su Chi. Lee also arranged for preferred persons to join the IIR as research fellows, such as Tseng Yung-hsien.⁶⁶

However, the IIR lost Lee's political trust in the 1990s. A series of intensified splits in the KMT and the shift of Lee's mainland China policy from pro-reunification—the KMT's orthodox stance on cross-Strait relations—toward pro-independence after the mid-1990s alienated the IIR from the president. Many IIR research fellows at the time—but not all—were against independence and supported his political rivals in the KMT. For example, Chou Yu-shan (周玉山) was a member of the KMT minority faction (非主流派) and a longtime secretary to Hau Pei-tsun (郝柏村), Lee's political rival within the KMT in the 1990s. He played a role in Hau's political cooperation with Lin Yang-kang's (林洋港) in the 1996 presidential election.⁶⁷ Some even actively participated in elec-

⁶²Tseng, *Cong zuo dao you liushi nian*, 222; Editorial Committee of the Memoirs of Professor Warren Kuo, *Guo jiaoshou qianhui xiansheng zhuisilu*, 69.

⁶³Sheng-tsung Tu, "Li Deng-hui siren zhinangtuan dahuanxie" (Personnel reshuffling of Lee Teng-hui's private brain trust), *Xinxinwen* (The Journalist) (Taipei), September 15, 1995, 15-16.

⁶⁴Wang, *Bu queding de haixia*, 106.

⁶⁵These four think tanks are the IIR, Chung-Hua Institution for Economic Research (中華經濟研究院), Taiwan Institute of Economic Research (台灣經濟研究院), and Institute for National Policy Research (國家政策研究中心). Shen and Weng, "Jinnang li youmeiyou miaoji?" 74; Kun-shan Chang, "Zongtong chang zixun de sigе xiaozu, you zhengda guoguan zhongxin deng danwei" (President often consulted four brain trusts, including the IIR and other institutes), *Lianhe bao* (United Daily) (Taipei), May 17, 1990, 2.

⁶⁶Tseng, *Cong zuo dao you liushi nian*, 226.

⁶⁷Chien-jung Li, "Zhou Yu-shan Lin Zheng-jie liquan, Hao jiaren zhongyu diantou" (Hau's family members finally agree after Yu-shan Chou and Cheng-chieh Lin's persuasion),

tions.⁶⁸ In June 1991, Premier Hau Pei-tsun made an inspection tour of the IIR,⁶⁹ but a few months later the NSB reportedly treated the IIR as a unit full of KMT minority faction supporters.⁷⁰ Consequently, Lee alienated many IIR research fellows, although he recruited many IIR directors and deputy directors into government or KMT positions with real responsibility. Consequently, the IIR did not participate in Lee's decisions on the "no haste, go slow" (戒急用忍) policy in 1996 and the "special state-to-state relationship" (特殊國與國關係) statement in 1999.⁷¹ The foundation of the Institute for National Policy Research (國家政策研究中心) in 1989 and the Taiwan Research Institute (台灣綜合研究院) in 1994 also demonstrated the declining role of the IIR in the eyes of Lee. These two private think tanks played an important role in his political reforms and mainland China policy in the 1990s.⁷²

In addition to political turbulence from the late 1980s to the mid-1990s, the increasing emphasis on foreign training and PhD degrees for university faculty members also exerted a great impact on the IIR. This

Lianhe bao (United Daily) (Taipei), November 15, 1995, 2; Kung-ping Hsieh, "Hao Bocun fuxuan buju fuxian" (Hau Pei-tsun's campaign arrangement emerges), *Lianhe bao* (United Daily) (Taipei), November 21, 1995, 3; Hsiao-tung Yang, "zhou Yu-shan fanbo zongtongfu fayan" (Yu-shan Chou responded to the statements made by the Presidential Office), *Lianhe bao* (United Daily) (Taipei), December 13, 1995, 2. Chou was expelled from the KMT in 1995.

⁶⁸These politically active IIR research fellows include Jaushieh Joseph Wu (吳釗燮), Wei Ai, Chang Tai-lin (張台麟), King Rong-yung (金榮勇), Tang Shao-cheng (湯紹成), and Wu Tung-yeh (吳東野). They were either candidates (or primary candidates) or campaign managers in the legislative election of 1995 or the national assembly election of 1996. At least three of them were sympathetic to the New Party (新黨)—a party formed by the supporters of the KMT minority faction in 1993.

⁶⁹"Hao kui xunshi guoguan zhongxin" (Premier Hau made an inspection tour of the IIR), *Lianhe bao* (United Daily) (Taipei), June 30, 1991, 2.

⁷⁰Chi-chang Yu, "Guo'anju mijian puguang shijian" (The event of the exposure of secret documents from the National Security Bureau), *Lianhe bao* (United Daily) (Taipei), October 30, 1991, 3.

⁷¹Chin-yao Cheng, "Gaichao huandai fenghua buzai, shichong de guoguan zhongxin yao suobian" (The IIR will be downsized after losing its luster in the face of government change), *Xinxinwen* (The Journalist) (Taipei), June 3, 2004, 59.

⁷²Lin, "Cong muhou xiance dao duoyuan fasheng," 5; Shu-ling Huang, "Changrong jituan guocce zhongxin" (The Institute for National Policy Research of the Evergreen Group), *Lianhe bao* (United Daily) (Taipei), May 20, 1990, 4.

Table 1
The Educational Backgrounds of IIR Research Fellows in 1996

Recruitment period	Doctoral degree holders before recruitment		No doctoral degree before recruitment		
	Overseas-trained	Locally-trained	Obtained a doctoral degree after working at the IIR		No doctoral degree
			Overseas-trained	Locally-trained	
1962-1984	1	1	2	10	33
1985-1990	9	1	2	1	5
1991-1995	12	1	1	0	3

Source: Research fellows' names were obtained from the NCCU faculty member and staff directory for the 1996 academic year. Background information was mainly obtained from the IIR website and other on-line information sources. The numbers in each cell were calculated by the author.

change in Taiwan's educational environment indirectly contributed to the eventual cut-off of the IIR's institutional ties from the state in 1996. The IIR began to regularly recruit overseas PhD holders after the mid-1980s. The initiator of this change in recruitment policy was Shaw Yu-min. In 1984, only nine out of more than fifty IIR research fellows had PhD degrees. In order to improve the research quality of the IIR, Shaw invited thirty-five professors from universities as contract research fellows (特約研究員) and expanded the recruitment of scholars with foreign training into the IIR, particularly those with foreign PhD degrees.⁷³

As table 1 shows, in the 1996 academic year, twenty-one overseas-trained PhD holders and two locally-trained PhD holders were recruited into the IIR from 1985 to 1995.⁷⁴ In the same period, among the other twelve research fellows who did not have a doctoral degree at the time of recruitment, three obtained their degrees from foreign universities and one from a local university later in their career by means of retaining their position without pay (留職停薪) (see table 1). This pattern differs sig-

⁷³Shaw, *Cisheng buyu*, 235.

⁷⁴Some examples of the former group are Wu Tung-yeh, Ho Szu-yin, Chang Tai-lin, Jau-shieh Joseph Wu, King Rong-yung, Cheng Tuan-yao (鄭端耀), Yeh Ming-te (葉明德), and Ouyang Chin-yi (歐陽新宜), while an example of the latter is Sung Kuo-chen (宋國誠).

nificantly from that which was observed before 1984. During the period between 1962 and 1984, as table 1 shows, only two research fellows held a doctoral degree at the time of recruitment, while another twelve non-PhD holders obtained a doctoral degree later in their career from local universities, particularly from GIEAS, after the mid-1980s through retaining their position without pay. The other thirty-three research fellows received no doctoral degree before retirement. In fact, a doctoral degree has been a prerequisite for IIR research fellow recruitment since 1995. The IIR also adopted an open-recruitment mechanism for research fellows for the first time in its history in the same year.⁷⁵

Political struggles in the process of democratization in Taiwan and demographic change in the educational backgrounds of IIR research fellows jointly caused internal tensions over the legalization of the IIR within the institute in the early 1990s. IIR research fellows were divided over the issues of the IIR's relationship with the state and of political attitudes toward Lee Teng-hui and his policy line. In February 1994, nineteen IIR research fellows went to the Legislative Yuan to petition for the full merger of the IIR with NCCU in order to rid the institute of state control,⁷⁶ which went against then IIR director Lin Bih-jaw's proposals submitted to the Presidential Office and the Executive Yuan.⁷⁷ Many of them were Western-trained PhD holders who were recruited after 1985. It is under this circumstance that Shaw Yu-min reassumed the IIR directorship in 1994 at the request of Lee Teng-hui and later decided to support the full merger proposal.⁷⁸

After full integration with NCCU in 1996, the IIR became a college-level scholarly research institute, with a hierarchical status on a par with

⁷⁵An anonymous reviewer of this article reminded the author of this development.

⁷⁶Hsiu-ling Chen, "Shijiu wei guoguan zhongxin yanjiuyuan fu liyuan chenqing" (Nineteen IIR research fellows petition the Legislative Yuan), *Zhongguo shibao* (China Times) (Taipei), February 23, 1994, 4.

⁷⁷The shared principle in Lin's three proposals is that the IIR remain a government think tank. For the proposals, see Chung-liang Hsieh, "Guoguan zhongxin dingwei wenti yinqi de zhengyi" (The dispute caused by the issue of the status of the IIR), *Xinxinwen* (The Journalist) (Taipei), February 27, 1994, 35.

⁷⁸Shaw, *Cisheng buyu*, 380.

that of university colleges such as the College of Social Sciences. This merger led to two consequences in terms of IIR-NCCU relations. On the one hand, the IIR director was chosen and appointed by the NCCU president, resulting in the loss of the state's de facto power over the selection of IIR heads. The ranking level of the IIR director was also downgraded two levels from Senior Grade 14 (簡任14職等), the same as the NCCU President, to Senior Grade 12 (簡任12職等).⁷⁹ On the other hand, the recruitment and promotion of IIR research fellows followed the same evaluation process as other university faculty members while depriving the IIR director of the power of personnel arrangement formerly held by his office. In addition, all IIR research fellows and staff were openly listed in the NCCU faculty member and staff directory for the 1996 academic year for the first time since the institute's nominal affiliation with NCCU in 1975.

The editorial policy of major IIR periodicals was also under transformation in the Chinese communist studies stage. Owing to new developments in cross-Strait relations and democratization in Taiwan, early China studies periodicals adopted new names in response to changes in the political climate. For instance, in July 1985 (vol. 28, no. 1) the IIR changed the name of *Feiqing yuebao* (匪情月報) to *Zhongguo dalu yanjiu* (中國大陸研究, Mainland China Studies)—a decision made by Shaw Yu-min.⁸⁰ A much more important adjustment was the adoption of double-blind anonymous review systems for academic journals. Before the mid-1990s, the absence of a sound peer review mechanism was commonplace among academic periodicals in Taiwan. For example, the review mechanism for IIR periodicals was to a certain extent a formality. IIR division heads and senior research fellows reviewed manuscripts and then decided their rejection or acceptance for publication.⁸¹ Scholars outside the IIR played a minor role or even no role in the old review process. Due to the National Science Council's (NSC) attempt to improve the quality of academic

⁷⁹Ibid.

⁸⁰Ibid., 236.

⁸¹Author's interview with IIR research fellow Wu Tung-yeh on March 18, 2013.

journals in Taiwan, the IIR decided to establish a real anonymous review process for its academic journals in the mid-1990s after Yun-han Chu (朱雲漢), convener of the political science section of the NSC from 1994 to 1997, sought support from the IIR for this new policy.⁸² The time-consuming process of anonymous peer review was disadvantageous for current situation analyses, which required quick publication. In other words, this review mechanism resulted in the further separation of academic research from policy analysis.

China Studies as an Academic Field and the IIR in a Transition Trap (Mid-1990s to the Present)

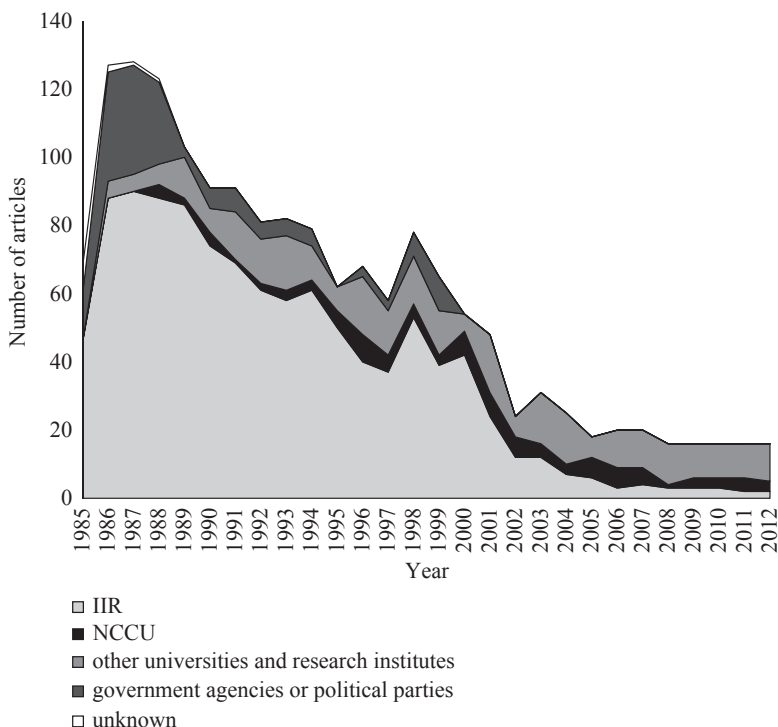
After experiencing dramatic changes from the mid-1980s to the late 1990s, Taiwan's China studies entered the contemporary China studies stage. In this stage, Taiwan's China studies completed its transformation from a state-dominated field to a truly academic one in which the state no longer politically dominated the research agenda, information sources, research methods, and research outputs.⁸³ A natural consequence of this transformation has been the diversification of this field.

China studies in this stage have several attributes. First, there is a marked rift between scholarly research and policy analysis. Although academics might provide policy consultation, publish current issue reports in policy-oriented periodicals, and execute government policy projects, their promotions have usually been based on academic publications. Policy analysts, usually affiliated with state agencies, have often found publishing their works in scholarly journals to be an uphill battle due to the rigorous anonymous review process. A typical example is that *Zhongguo*

⁸²Author's interview with former IIR director Ho Szu-yin on March 20, 2013. IIR cooperation was crucial for the NSC's attempt to establish the truly anonymous review system because the IIR published several major journals in political science and China studies.

⁸³For similar views, see Wu, Chen and Chen, "Kua haixia xin shehui yanjiu," 13; Chang and Lee, "'Zhongguo yanjiu' zai Taiwan," 252-62.

Figure 1
The Institutional Affiliation of Authors in *Zhongguo dalu yanjiu*



*For coauthored articles, only the institutional affiliation of the first author is coded.

dalu yanjiu has not published any articles authored by persons working in the government or political parties since 1999 (see figure 1). Moreover, scholars have not necessarily only interacted with government institutions and research topics have not only been limited to the realm of policy. This shows that contemporary China studies scholars do not exist solely at the service of the government.

The second attribute is the encounter between area studies and disciplinary studies in the China studies field. China's rise attracted political scientists, economists and sociologists to enter the field. Scholarly journals in these disciplines began publishing articles with relevance to

the PRC and cross-Strait relations.⁸⁴ More students from diverse universities have written their theses on different issues relevant to mainland China.⁸⁵ At the same time, China studies journals have received manuscripts from scholars affiliated with various social sciences-related departments or graduate institutes. This change demonstrates that China studies in Taiwan is no longer simply an area study, but is comprised of a variety of academic disciplines and the classical area studies tradition, which emphasizes the extensive and overall understanding of a country or region. Scholars can utilize the research paradigms studied in their own disciplines to do research, engaging in theoretical dialogue and publishing their work. This has added diversity and specialization to the China studies field. During this time many universities have begun offering China studies courses. Furthermore, frequent academic conferences have provided ample opportunities for contact between scholars on both sides of the Taiwan Strait.

The third attribute of the contemporary China studies stage is that research topics and methods have become more diverse, and the development of the field has become subject to higher education policy, rather than political restrictions. In terms of research topics, China studies have expanded from the study of high politics to include the study of low politics. However, politics and elite research have taken a back seat to social, economic, and diplomatic security topics.⁸⁶ Personnel issues, in particular, are no longer in strong academic demand, reflected by the fact that few scholars have invested resources and efforts in this topic. With regard to research methods, many Taiwanese scholars have traveled to China to conduct field research in light of reduced restrictions. Scholars have also begun to set up databases or utilize those already accumulated by others in order to facilitate large-scale, longitudinal analysis. Thus, the research achievements of this stage have placed emphasis on qualitative

⁸⁴For example, *Taiwan zhengzhi xuekan* (台灣政治學刊, Taiwan Political Science Review) published the first article on China studies in December 2005 (vol. 9, no. 2).

⁸⁵Wu, Chen, and Chen, "Kua haixia xin shehui yanjiu," 22-24.

⁸⁶Wang, "Taiwan Zhongguo zhengzhi yanjiu de xipu," 9-13.

and quantitative characteristics, although most publications still use qualitative methods.⁸⁷

Meanwhile, higher education policies such as journal citation systems, university program evaluation (大學系所評鑑), and the Aim for the Top University Project (邁向頂尖大學計畫) have produced a strong impact on the research output of China studies. For example, starting in June 1999, the National Science Council's Research Institute for the Social Sciences began to set up the Taiwan Social Sciences Citation Index (TSSCI) and announced its first TSSCI list of included journals in October 2000.⁸⁸ Subsequently, TSSCI journals, as well as Social Sciences Citation Index (SSCI) journals, gradually became important promotion and award indicators for university professors, particularly those affiliated with the universities in the Aim for the Top University Project (although not the only indicators).

The emergence of the TSSCI directly resulted in a reshuffling of the ranking of Taiwan's journals. Old-line journals that were able to adapt to changes in the scholarly climate, such as *Wenti yu Yanjiu*, *Zhongguo dalu yanjiu*, and *Issues & Studies*, successfully transitioned from policy analysis journals to scholarly journals. Those that continued (or retained in part) their policy analysis orientation faced difficult challenges in attracting manuscripts from scholars at research-oriented universities, such as *Zhonggong yanjiu* (中共研究, Studies on Chinese Communism) and *Gongdang wenti yanjiu* (共黨問題研究, Studies in Communism), which was later renamed *Zhanwang yu tansuo* (展望與探索, Prospect & Exploration) in January 2003. The journals that were unable to be immediately included in the TSSCI list also faced challenges in attracting a sufficient number of high-quality manuscripts, such as *Dongya jikan* (東亞季刊, East Asia Quarterly),

⁸⁷Ibid., 7-8.

⁸⁸Chung-min Kuan and Ruoh-rong Yu, "'Taiwan shehui kexue yinwen suoyin' ziliaoku de jianzhi gaikuang" (A profile of the establishment of the TSSCI databank), *Renwen ji shehui kexue jianxun* (Humanities and social sciences newsletter quarterly) 3, no. 2 (October 2000): 66-706.

which adopted *Dongya yanjiu* (東亞研究, East Asian Studies) as its current name and changed its publication frequency from a quarterly to a biannual publication in 2004. The introduction of university program evaluations and the Aim for Top University Project fortified the developments discussed above. SSCI/TSSCI-listed publications are often used as an important factor in evaluating academic achievement.

The last attribute of this stage is the occurrence of a new round of generational replacement of scholars. After the mid-1990s many PhD returnees specializing in China studies returned to Taiwan, where they gained positions in major public research institutions and universities. These returnees were born in the 1960s and after,⁸⁹ in contrast to the fact that most returnees who returned to Taiwan before the mid-1990s were born in the 1950s or earlier. Taking the IIR as an example, only two research fellows who joined the IIR before 1995 belonged to the 1960s generation but all IIR recruits after 1998 were scholars of the generation of the 1960s or the 1970s. These returnees formed the new wave of China studies scholars in Taiwan, but their influx also led to fewer opportunities for locally trained PhD holders. Of course, GIEAS continued to train many PhD students to enter the China studies field.⁹⁰ Thus, we can say that this generational shift in Taiwan's China studies was primarily driven by returnees from abroad, with PhD graduates from GIEAS serving as a secondary impetus.

After addressing the general characteristics of Taiwan's China studies in the current stage—the contemporary China studies stage, this article

⁸⁹Some examples are Hsu Szu-chien (徐斯儉), Phillip Szue-chin Hsu (徐斯勤), Kou Chien-wen (寇健文), Keng Shu (耿曙), Tao Yi-feng (陶儀芬), Tung Chen-yuan (童振源), Chen Chih-jou, Wu Jieh-min, Chen Ming-chi, Wu Der-yuan (吳得源), and Simon Teng-chi Chang (張登及), as well as younger returnees Titus Chih-chieh Chen (陳至潔), Tsai Chung-min (蔡中民), Liou Chih-shien (劉致賢), Hans Han-pu Tung (童涵浦), and Chelsea Chia-chen Chou (周嘉辰).

⁹⁰Some examples are Pan Chao-min (潘兆民), Dong Li-wen (董立文), Hsu Chih-chia (許志嘉) (deceased), Wang Hsin-hsien (王信賢), Liu Chin-tsai (柳金財), Chang Hong-yuan (張弘遠), Wang Chia-chou (王嘉洲), and Wang Chi-nian (王綺年), as well as younger scholars such as Tsai Wen-shuen (蔡文軒), Chung Yen-lin (鍾延麟), Shao Hsuan-lei (邵軒磊), and Emmy Rui-hua Lin (林瑞華).

turns its focus to the development of the IIR. After the IIR fully merged with NCCU in 1996, the institute was no longer affiliated with the state. However, on July 18, 2001, Jaushieh Joseph Wu, then deputy director of the IIR, led several IIR research fellows to make a report to President Chen Shui-bian (陳水扁) about the internal situation of mainland China. The dispatch from the Office of the President stated that, according to the report, the CCP faced several severe challenges and was in danger of “*wangdang wangguo*” (亡黨亡國, the ruin of the party and the country).⁹¹ This report sparked criticisms from other IIR research fellows and led to the decision to prohibit the publication of politically-sensitive policy reports without the prior approval of the institute. The IIR made an official decision to prohibit the issue of politically sensitive policy reports in the name of the IIR by individual research fellows. After this event, IIR research fellows could only provide personal policy consultation. The separation of the IIR from the state was thus completed. Therefore, the IIR has to compete for research outputs and policy influence with others in a democratized and pluralistic society. So far, the IIR’s efforts have achieved only partial success, due to NCCU’s hesitation regarding the role of the IIR in the university and the lack of strong support for the rejuvenation of IIR research fellows.

In this period, the IIR continued to recruit PhD holders, particularly those with foreign doctoral degrees. This led to the increase in the percentage of PhD holders among IIR research fellows (see table 2). However, the IIR’s efforts to rejuvenate its research fellows suffered a serious setback primarily due to NCCU’s decision to downsize the institute in 2004 (see figure 2). From 2003 to 2005, the IIR lost almost 80 percent of its young assistant research fellows who were recruited between 1996 and 2002. Seven assistant research fellows with foreign doctoral degrees

⁹¹Office of the President, “Zongtong tingqu “Zhongguo neibu qingshi pinggu baogao’ jianbao” (The president listened to the briefing on “the assessment report on the internal situation of mainland China”), Office of the President, July 18, 2001, <http://www.president.gov.tw/Default.aspx?tabid=131&itemid=2654>. Wu was appointed deputy general secretary of the Presidential Office in April 2002.

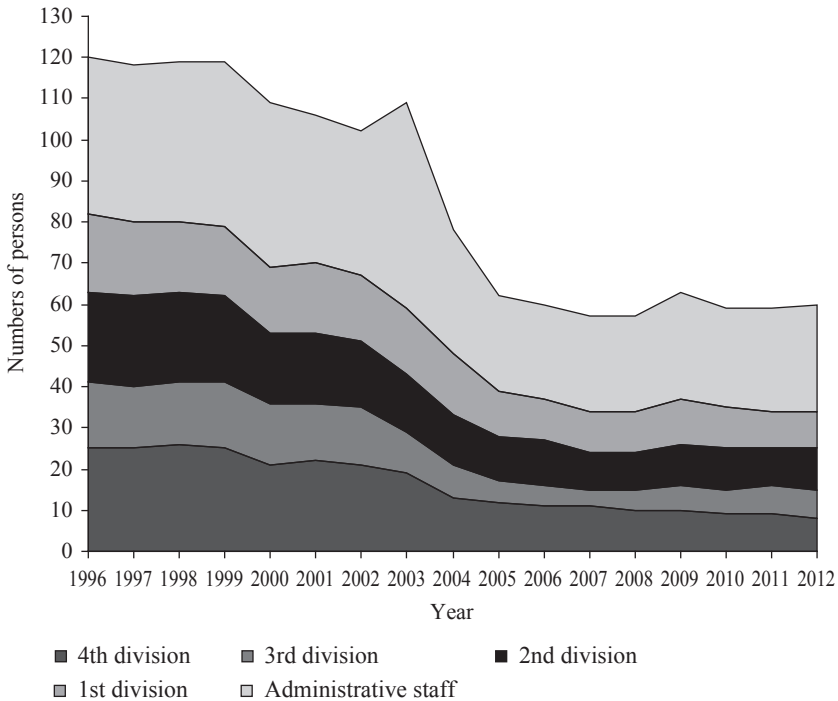
Table 2
The Educational Backgrounds of IIR Research Fellows in Selected Years

Year	Doctoral degree holders before recruitment		No doctoral degree before recruitment		Total	
	Overseas-trained	Locally-trained	Obtained a doctoral degree after working at the IIR			No doctoral degree
			Overseas-trained	Locally-trained		
1996	22	3	5	11	41	82
2003	23	3	4	9	20	59
2012	18	5	3	4	4	34

transferred to other universities/research institutes or other departments of NCCU while only one foreign-trained and one locally-trained PhD holder stayed. Since many of these young scholars were China studies specialists, their departure strongly weakened the IIR's competitive advantage over resources and research outputs in the field today. Even worse, NCCU did not provide the IIR with enough position quotas in order to recover from the loss of these research talents. As a result, from 2003 to 2007 the IIR recruited only two new research fellows.

In this stage, *Issues & Studies*, *Wenti yu Yanjiu*, and *Zhongguo dalu yanjiu*—three major IIR journals accepting manuscripts on China studies (and/or international relations) issues—reduced their publication frequencies from monthly to bi-monthly and then to quarterly. While the adoption of increasingly rigorous and longer double-blind anonymous review systems after the mid-1990s indeed improved the quality of articles published in academic journals, the high rejection rate of manuscripts led to a decline in the number of articles available for publication. In response to this tendency, scholarly journals reduced their publication frequency. The publication frequency of *Issues & Studies* changed to bi-monthly in January 1999 (vol. 35, no. 1) and to quarterly in January 2002 (vol. 38, no. 1). *Zhongguo dalu yanjiu* became a bi-monthly journal in January 2002 (vol. 45, no. 1), and a quarterly in January 2004 (vol. 47, no. 1). *Wenti yu Yanjiu* followed the same trend—the adjustments of publication frequency occurred in January 2001 (vol. 40, no. 1) and in January 2007 (vol. 46, no. 1).

Figure 2
The Changes in IIR Manpower from 1996 to 2012



*Some research fellows who were temporarily transferred to administrative posts are still counted as research fellows. Research assistants are classified as administrative staff.

Data source: The NCCU faculty member and staff directories of the academic years from 1996 to 2012.

Meanwhile, major IIR journals have become more open in the 2000s than before, which is reflected by the fact that these journals have published far fewer articles authored by IIR research fellows in the 2000s. For example, from 1985 to 2012, the share of articles authored by IIR research fellows in *Zhongguo dalu yanjiu* significantly declined. As figure 1 shows, in comparison with the annual percentages of *Zhongguo dalu yanjiu* articles authored by IIR research fellows between 1985 and 2002, which were always higher than 50 percent, the annual share decreased to 20

percent or less after 2006. Meanwhile, the share of authors from other universities and academic institutes has remained at over 50 percent following the same year.

Conclusion

The representativeness of the IIR in Taiwan's China studies has declined over time. The decrease in representativeness itself is full of implications—revealing the depoliticization, proliferation and pluralization of the entire field. In the past sixty years, the IIR has undergone a great transformation, moving from a government think tank to a competitor for academic achievement and policy influence. The institute has cut off its ties with the state, recruited many PhD holders in order to rejuvenate its research fellows, and adjusted the editorial policy of its major scholarly journals. The success of the IIR in these dimensions is very impressive.

Meanwhile, the China studies field has also experienced dramatic changes. The direction of this evolution can be summarized by three terms: depoliticization, proliferation and pluralization. Depoliticization refers to the change in the research mission of China studies from serving politics to being independent of the state's policy demands—scholarly research can exist on its own. This change has affected long-term changes in the educational backgrounds of scholars, the evaluation standard of research performance, and the editorial direction of academic journals in this field. Proliferation represents the transformation of Taiwan's China studies from official knowledge with limited circulation to free access without political constraints. For example, China's rise attracted discipline-focused scholars to enter the China studies field, which was formerly occupied by scholars with area studies training. Pluralization refers to the situation in which research topics (high politics or low politics issues) and research methods (qualitative or quantitative) also became more diversified over time. The coexistence of discipline-oriented scholars and area studies specialists in China studies also contributes to pluralization.

The driving forces shaping the developmental trajectory of the IIR

and the entire China studies field have differed in each stage. From the early 1950s to the mid-1980s, the dynamics of evolution came entirely from politics, both internationally and domestically. Political motives such as the need for fighting against the communist rebels and maintaining Taipei's international status determined the rise of the IIR as a government think tank and guided the development of the China studies field. In other words, the representativeness of the IIR in Taiwan's China studies is a direct reflection of the policy-oriented nature of the China studies field.

During the period from the mid-1980s to the mid-1990s, the driving forces included political and educational development, with a primary emphasis on the former. The former included factors such as democratization, factional conflicts within the KMT and the improvement of cross-strait relations, while the latter were generational changes of scholars and the increasing importance of doctoral degrees, particularly foreign PhD degrees. Facing these challenges, the IIR suffered internal political tensions and generational differences during its search for its new role. Meanwhile, the China studies field steadily became an academic field with independent and plural characteristics. One may treat this period as a transitional stage from policy analysis to academic research.

From the mid-1990s to the present, educational factors have outweighed political ones because no political intervention from the state has bothered the IIR and the China studies field. For example, anonymous journal review systems, the TSSCI journal list, university program evaluation, and the Aim for the Top University Project have played key roles in affecting the development of the IIR and the China studies field. NCCU's decisions have also strongly affected the evolution of the IIR, such as the annual quotas for recruits assigned to the IIR and the decision to downsize the IIR.

In this period, the entire field can certainly be characterized as academic; however, the IIR is still in a transition trap. The IIR has lost its function as a government think tank but is unable to steadily improve its overall research output in quantity and quality, although some individual research fellows perform very well in policy consultation, academic research or both. NCCU should take a part of the blame for this dilemma.

NCCU's decision to downsize the IIR in 2004 not only reduced the manpower of the institute but also produced a lasting negative effect on its research output and its transition. As of yet, the institute has not recovered from the heavy loss of young research talents in the mid-2000s.

The primary task of the IIR in the near future is to accelerate the generational shift of research fellows by recruiting more outstanding young scholars and to provide these recruits with stable and comfortable research environments. Their maturation will bring a new golden era to the institute. The IIR also needs to re-examine the current incentive mechanisms in performance evaluation and resource allocation in order to encourage the production of more academic publications in different languages and different forms. Finally, cooperation between the IIR and other units in NCCU in teaching and academic research should be strengthened. These three tasks can be done if the IIR can obtain strong support from NCCU. In case the IIR has extra energy after completing the above tasks, the institute may design a voluntary policy consultation platform as a goal secondary to academic research by which IIR research fellows and faculty members from NCCU and other universities may provide policy suggestions for the sake of increasing the social impact of the IIR and NCCU.

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