



Contestation for Innovation:

The Construction of Taiwan's New Southbound Policy

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Abstract

When in early 2016 the Democratic Progressive Party (DPP) came to power the newly elected president Tsai Ing-wen launched the New Southbound Policy (新南向政策 Xin Nanxiang zhengce, NSP). Although going south was nothing new for Taiwan when looking at economic-driven incentives, the NSP is said to go beyond in order to foster cultural exchange and people-to-people relations. New features have been woven into the fabrics of the NSP. By doing so, a narrative of a new role of an innovator was actively constructed. How can we understand those new features and how does the NSP constructs a new role as an innovator by contesting the old? This contribution applies a role theory approach and argues that the NSP not only implements a new policy but also indicates a shift in the very core of Taiwan's self-identification. Building on role theory to understand the relation of contestation and role formation, this paper traces shifts in narrative by a qualitative content analysis and follows to introduce the analytical frame of the role of an innovator.

Keywords: Taiwan; New Southbound Policy; Narrative; Role Theory; Innovation

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In midst of increasing global challenges, Taiwan's electorate voted in 2016 for a new era to come. When the first female president of Taiwan Tsai Ing-wen 蔡英文 (*1956, 2016-) got elected, she promoted the New Southbound Policy (*Xin Nanxiang zhengce* 新南向政策, NSP). With it, the foreign policy aimed to enhance economic trade among 18 countries in Southeast Asia and members of ASEAN. According to the government, the NSP "has been adopted in order to identify a new direction and a new driving force for a new stage of Taiwan's economic development, to redefine Taiwan's important role in Asia's development, and to create future value."¹ The southbound outlook in Taiwan's external policy agenda was nothing new. Taiwan's foreign policy tradition of going south started in the 1990s and pursued the road of liberalization based on economic incentives. Although, Tsai's new approach of the NSP continues to some extent the economic aspects, some new features have been woven into the fabrics of this new policy. The new trait is said to go beyond economy in order to foster cultural exchange and people-to-people relations. In that sense, the narrative of the former policy got contested by introducing something profound in terms of its characteristics. The NSP contests the former agenda of an economic-driven rational in-depth and substance. By doing so, this paper argues that a narrative of a new role was actively constructed and that it supports the creation of the role of an innovator. Yet the question is, how to understand those new features and how the NSP constructs a new role as an innovator by contesting the old? In this research agenda, the study applies role theory to tackle how a former role conduct, as in the southward going approach, is used by a government to implement a substantially new agenda. The argument is that on behalf of the newly elected government, the former national role conception (NRC)

1 Refers to <https://newsouthboundpolicy.trade.gov.tw/English/PageDetail?pageID=50&nodeID=94>.

got domestically contested by means of promoting a new Self. As will be analysed below, the former economic-driven self-identification gave way to an innovative-driven approach. By constructing the narrative of an innovative Taiwan, the self-identification forms a new role identity for the national role conception. Based on the constitutive understanding that the contestation of a national role concept also reflects shifts in how role beholders identify themselves, this paper argues that the NSP not only implements a new policy but also indicates a shift in the very core of Taiwan's self-identification. Despite describing causalities, role theory is applied to describe the way of understanding constitutive relations and the processes of multifaceted role formation. Instead of asking "why" for an explanation, the constitutive research context applied in this contribution asks the question of *how* (cf. Hollis & Smith 1991). The aim is to understand the formation of a new role in regard of contesting the very basis of the former national role conception, the self-identification. Building on role theory, this paper traces the new narrative within the NSP to support the argument of a contested self-identification and vis-à-vis the creation of a new role. The study seeks to introduce the features of the role of an innovator for further analysis. In particular, this study undergoes a qualitative content analysis to show shifts in the underlying narrative regarding the NSP and to demonstrate the plausibility of the role theoretical approach.

1 Role Theory as Research Context

Research designs that apply role theory and a constitutive understanding has increased over the past decades. After Holsti published his seminal work in 1970, more recently two major lines developed in the field of political science. One line reaches out to International Relation approaches analyzing structural aspects of roles and the co-constitutive nature of role taking/making within international relations and structures in interaction (Breuning, 2011; Elgström & Smith, 2006). In the last decade, the application of role theory became more prominent emphasizing social aspects, social norm development and contestation. The other line of research focuses on the actor and its underlying processes of role

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performance, role evolvment and self-identification within the actor (Harnisch, 2011).² With the turn towards social constructivism in social sciences, social constructed role conceptions shape international and foreign policy, and research turned to include the study on ideas and identity alike (Harnisch & Baumann, 2012; Shih & Yin, 2013; Thies, 2008). Although, role theory supports both, the analytical spectrum of ‘explanatory and understanding’ (cf. Hollis/ Smith 1991; Wendt 1998), the turn to understanding and/or constitutive analysis gave role theory a grave boost.

The research approach of role theory has manifold values. According to Leslie Wehner and Cameron G. Thies (2014, p. 2), “these values explain the renewed attention that role theory has received in recent years.” While the merits of the constructive approach still outweigh the pitfalls, the application of role theory has also faced criticism. The neglect of domestic contestation underneath the actor’s unified National Role Concept (NRC) is one example (cf. Wehner & Thies, 2014, 3). The tendency of black-boxing the elites is another example, condemning role theory approaches to assume some degree of unity and agreement, although this might not be the fact (Cantir & Kaarbo, 2012, p.8; cf. Brummer & Thies, 2015). Deviant actor’s foreign policy-making might be hidden by aggregation (Cantir & Kaarbo 2012, p.8) and result in contestation. The application of a role theory procures a different perspective on domestic politics, and might generate a different outcome when taking into account that agents might rely on the role’s identity rather than political preferences (cf. Cantir & Kaarbo 2012, p. 17). Pursuing this line of thinking, several scholars offered approaches to tackle the domestic mechanisms in the analysis of roles. Kaarbo and Cantier followed their study of NRC (2018), other scholars elaborated on the nexus of actor’s specifications in international role formation (Harnisch, Frank & Maull, 2011) or presented works on domestic role formation (Harnisch, Gottwald & Bersick, 2016; Perkuhn 2021). In sum, the constructive approach describes the simultaneous co-dependency of changes of an actor regarding the inside and the outside. While a one-directed cau-

² This line builds on the identification of a self in society in alignment of George Herbert Mead. 1934. *Mind, Self, and Society*. Chicago: University of Chicago Press.

salinity is hardly reasonable in that context, the constructive approach of role theory describes an analytical perspective, in which a changed role might indicate an adaptation strategy towards a co-constitutive alter or indicate the shifted self-identification through domestic role contestation (Harnisch, Frank, Maull, 2011, p. 8-9; Turner, 1990, p.27-28). Even though externalities might trigger role shifts as a result, the process of contestation and change happens domestically.

2 Key Terms of Role Theory

Although the role theory research community shares some understandings of key terms and mechanisms, variants are distinguishable. To some extent, they depend on the assumption and focus of each individual author (cf. Aggestam 2006, p. 18). The next section therefore introduces key terms to benefit the theoretical understanding of the relation between self-identification and national role contestation.

Unfortunately, the term ‘role’ is still broadly used in a colloquial sense. In the context of role theory, a social role defines an actor’s position within a group it is directed to and carries a specific or general function for this group (Harnisch, 2011, p.8; cf. Thies, 2010). Roles *enable* political action and facilitate agency. The specific social context constrains the role and its role bearer. The role theoretical approach draws from social science and psychology alike when the state is seen as an actor with similar characteristics as a person who is complemented by and constituted through multiple relations. For example, an individual being enacts different roles in different contexts, such as a citizen, a co-worker, and a family member. Accordingly, roles are defined as inter-subjective and interactional, because, “a role cannot exist without one or more relevant other-roles toward which it is oriented” (Turner, 1962, p.23) and the self can only be recognized by the complementing other, as in the realization of an “I-part” through the “Me-part” (cf. Harnisch, 2011). Similar to a person’s different social involvements, a state can bear different roles at the same time in different contexts. If not mutual exclusive, all simultaneously enacted roles compose a role set. The

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unitary actor inhabits variant roles, for example a family man is most likely a husband, a father, a son or brother himself within his greater family. The bearing of roles within variant settings might origin from the different role functions and can be a source of domestic contestation.

The base for each role grounds on a self-identification that forms a role identity. In contrast to an adapting mechanism to a situational context, this role identity is more persistent and harder to change. Instead of vested interest, the constitution of a role identity derives from the intersubjective nature in the process of self-identification (Perkuhn, 2021, p.11). Social constructed role identities are more stable but not static, so that alterations, transformations and changes happen over time in sequences, caused by external triggers, further development and/or contestation (cf. Perkuhn, 2021). Role theory conceptualizes to link aspects of identification to the formulation of roles through role identities (Perkuhn, 2021). The core element that shapes the role conception here is the role identity. When the self-identification is affected, changes occur and differ from the National Role Conception (NRC). Whereas roles are temporally and contextually limited, a role identity in contrast accounts for the process that reiterated enactment of a specific role influences the role conception. In consequence, the role becomes part of the identity, lasts and inflicts other co-constitutive role sets. In the research context, a role identity describes the ontological self-understanding of a role and the NRC refers to the state's conception of a role. Both define an ideal of the enacted role for interplay and shape the possible role set as well as the process of role formation.

In the formation of roles, historical aspects are important. When actors are forced to take over a new role, the mass public “with its underlying beliefs and attitudes shaped by cultural and historical experience” plays a part (Brummer & Thies, 2015, p.277). Each actor builds on a historical perspective of itself and entails a self-description, which also manifests as an historical self-identification. In contrast to an external counter-role giver, the historical self can also function as a significant other in the formation of a (new) role (cf. Benes & Harnisch, 2014). Hence, it functions as the driving source for a domestic role contestation. This

contribution follows up on this understanding.

3 The Interlinked Processes of Contestation and Role Formation

Based on the understanding that a contestation of a role also reflects shifts in the national role concept and vice-versa, this paper argues that the NSP not only implements a new policy but also indicates a shift in the very core of Taiwan's self-identification. For this to happen, two processes interlink: the process of contesting the existing national role conception by introducing a transformed narrative and the process of forming a new role identity due to the outcome of a shifted self-identification by the process of contestation.

This results in the process of contesting the conduct of former self: In addition to the research approach by Cantir and Kaarbo, linking domestic role contestation to contemporary actors or current political party politics, the present approach adopts the theoretical approach of the contestation of the historical self. Going south has been ingrained in Taiwan's foreign policy conduct regardless the ruling political party (see also Chart 1). Therefore, the southward approach cannot be easily linked to the politics of bipartisan leadership. The NSP introduced under Tsai Ing-wen is not just the rehashed policy of former DPPs approach. Although, party politics seem to run Taiwan politics in general, the formulation of the NSP marks a deeper turning point. Taiwan's rejection of the former self might not be as disruptive as compared to demilitarized Germany after the Second World War. Nonetheless, this contribution assumes that the significant other for the formulation of the NSP is Taiwan's former self in contrast of an external actor or foreign entity. The contesting actor is the newly elected government that brings forward the narrative of a new political generation. Mainly official statements regarding the promotion of the NSP by president Tsai Ing-wen are used as aggregated output of the underlying debate for the analysis of the contestation.

In that interlinked process, material changes and developments matter.

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Ongoing international interaction takes place and constantly influences the domestically driven role contestation. Besides Taiwan's position in the world, also globalization effects impacted on Taiwan. Both influence the playground for role formation processes. Hence, in the context of domestic role contestation, an increased international interaction also influences the condition of the material self. As a matter of fact, Taiwan's economic development and productivity in technological achievements enabled a shift in self-identification.

In the process of adopting and transferring the NSP into a trait of the self, the self identifies with it and results in role identity (cf. Perkuhn, 2021). The new narrative about Taiwan takes shape by implementing the policy and adopts features of the formulated NSP. This describes the process of constructing a new NRC. When the features are adopted as traits of identification, this indicates the shaping impact of the policy to the role identity. From the altered role identity, we can draw conclusions for the newly foreign policy role that I will introduce as the "role of an innovator".

4 How to apply narratives in role theory research?

In this approach, narratives are applied as means of an interpretive method for analysis. In social science, narratives have been introduced for analytical purposes, such as the approach of analytical narratives (Bates, 1998). Here, a narrative characterizes the focus that lies on the story and context told, while the required analytical reasoning (Bates, 1998, p. 10) is given by the applied role theory. Narratives contextualize norms, beliefs, attitudes and a world perspective like a framework of understanding. They function as a background story for the role formation. Regarding the application of narratives in the context of role theory Wehner and Thies stated,

"Narratives in the interpretive approach produce and reproduce traditions and are able to capture changes in traditions in light of new dilemmas [... and they] are thus understood as strategies

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constructed by political agents that speak on behalf of the state, in internal and external relations, to frame and cast roles and achieve specific goals and interests.“

(Wehner & Thies, 2014, p.11).

Further on, they elaborate on how narratives can be applied as method by “analysing different sources viewed from different angles with a goal of bringing them into perspective” (ibid). The study by narratives necessarily relies on different actors, sources and/or specific times, so that it is possible to understand how roles form against the background of domestic change and how a contestation occurs. The contested subject of this study is the aggregated southward policy of the historical self. Usually, the narratives as method rely on primary and secondary sources, such as policies, official documents and press declarations. They are used “to find yardsticks for specific narrations“ (Wehner & Thies, 2014, p. 11). The narrative behind the former southbound policies will be drawn on the basis of a literature review. In addition to a commenting academic debate, the analysis of the NSP focuses on the self-promoted governmental agenda.

A new role conception succeeds the alteration or contestation of a former role. According to the constructive approach, to trace a domestic role contestation of a dominant or former role, changes to the former narrative and self-description function as indicators. In that way, a shifted narrative indicates a new role. To analyse this comprehensive circle of domestic contestation affecting the self-identification, this study takes the former southward policy of Taiwan as baseline for the description of Taiwan’s role identity of foreign policy role conduct. According to the argument outlined above, the narrative itself should impose the new features. This is how the NSP contests the former self-identification and sets forward the new role of an innovator.

What is meant by innovation? In the last decade, the term has become a catchphrase similar to ‘cyber’ that basically relates to anything ‘techy’. The word innovation is derived from Latin and denotes novelty. In this context, innovation relates to the creation of political framework

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with conditions that offer solutions for socio-political or socio-economic problems by means of innovative technological developments. The most intrusive example is the recently rampant COVID-19 pandemic or rather how to defy it by mobile or web applications and for monitoring and management. In general, implementing a novelty means to propose something new that ultimately also contests a predominant trait or understanding. In this context, contestation for innovation refers beyond the general assumption of something new in particular to the theoretical context of role theory and the process of role contestation to actively promote an innovative self. The narrative approach seeks to go beyond the counting of technological innovation or tech parks in order to trace a more comprehensive understanding of innovation. For example, the ideal of an innovative Taiwan as a political entity defines against the background of domestic gains while taking over a position among others for promoting progressive values to that group. The difference of this innovative concept includes innovation as method of how to encounter the world and procuring solutions, such as digitalization of work space and processes.

5 The Former Narrative Behind Going South

The following is a brief outline of Taiwan's former southbound policy to extract the NRC of the historical self that will be contested by the NSP. The description presents the understanding of Taiwan's historical self and serves as the counter-role for the formation of the new role by domestic contestation.

5.1 President Lee Teng-hui Goes South

Going south is nothing new for Taiwan. Although Tsai's proposed *new* southbound policy seems as following a trajectory of path-dependency, the means and strategy behind going south have diverged over the last decades (cf. Chart 1). That Taiwan is strategically reaching out southwards started with former President Lee Teng-hui 李登輝 (1923-2020,

1988-2000) in the 1990s, when his foreign policy set sail to pursue the road of liberalization based on economic incentives with special regard to the ASEAN countries. In the aftermath of the downfall of the Soviet Union the world experienced a wave of liberalism and, mainly economically speaking, liberalization. Against that political background, policymakers followed the understanding that economic ties secure peaceful cooperation and ultimately build trust over time. In addition, another circumstantial effect emerged in the reshuffle of the world order after the fall of the Soviet Union and the opening up of the People's Republic of China (PRC): the PRC grew stronger economically and ultimately politically. To what extent the former President Lee had both trajectories in mind when he launched the "Go South" Policy (1994-1996) is uncertain. Yet, the foreign direct investments (FDI) that flew into ASEAN countries even outgrew the amount of investment that went across the Strait. According to a CSIS report on *The New Southbound Policy, Deepening Taiwan's Regional Integration*, "the FDI into ASEAN countries grew from \$1.76 billion in to \$4.98 in 1994" and "Taiwan's investment into Mainland China fell from \$3.17 billion to \$962 million" (Glaser, Kennedy & Mitchell, 2018, p.3).³ Granting his party affiliation, the strategy foresaw a "three-pronged strategy to boost investments from both KMT-affiliated companies and state-run companies in Southeast Asia, while simultaneously increasing the flow of foreign aid to targeted countries" (Glaser, Kennedy & Mitchell, 2018, p.3). In midst of the beginning Asian financial crisis before the elections, Taiwan's Ministry of Economic affairs shifted its policy to encourage domestic industrial growth at the cost of FDIs in December 1996 (Glaser, Kennedy & Mitchell, 2018, p.3).

5.2 Manifesting the NRC of Going South

Although the Asian financial crisis reached its peak, the then re-elected President Lee Teng-hui launched a second term of the "Go South" policy in 1997. According to Andrew Yang of the Center for Advanced

³ For online access go to https://csis-website-prod.s3.amazonaws.com/s3fs-public/2022-10/180613_Glaser_NewSouthboundPolicy_Web.pdf?VersionId=cbs.Isc0WZ7FhB3I9OvdL1L_Gr42Gh52

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Policy Studies, the “Go South policy—shifting the westbound policy to a southbound policy—coincides with his [Lee Teng-hui’s] strategy”, as mentioned by Richburg (1998).⁴ Once again, that policy favoured the economic-driven party interest and in particular the KMT-affiliated companies as “[o]ne of the leaders of the Go South strategy is the Taipei-based China Development Corporation, or CDC, the business arm of the ruling Kuomintang (Nationalist) party.” (Richburg, 1998). In contrast to scepticism, whether the strengthening of economic investments will win Taiwan long-term ties and support, “Lee viewed the crisis as an opportunity for Taiwan, and he remained steadfast that despite the ongoing market turmoil, investment into Southeast Asia would benefit Taiwan” (Glaser, Kennedy & Mitchell, 2018, p.7). As a result of the political agenda, a holding company was installed. The Southeast Asia Investment Company conducted mergers and acquisitions in the region (Glaser, Kennedy & Mitchell, 2018, p.7). In sum, the goal of going south under President Lee functions the objective of growing Taiwan’s economic outcome and minimize dependency from the business in and with Mainland China by diversifying FDIs—mainly to south-east countries or in particular ASEAN countries. The narrative of going south relied on economic gains and manifested the self of the economic developer and powerhouse that brought about the foreign policy of the pocket money.

During the Presidency of Chen Shui-bian 陳水扁 (*1950, 2000-2008) Taiwan’s renewed approach of “Go South” pursued the additional strategy of increasing Taiwan’s regional influence by means of business investments. Alongside the injected money, the investments diversified and hence “the policy also established assessment mechanisms, facilitated industry investments, and provided training for returning employees” (Glaser, Kennedy & Mitchell, 2018, p.8.). Quite controversial to the aim of “reducing economic reliance on the Mainland”, according to Glaser et al (Glaser, Kennedy & Mitchell, 2018, p.8) “Chen’s own policy paved the way for business from Taiwan to seek opportunities on the Mainland”. As a result of Chen’s market liberalization policy in

4 Quote taken from “Taiwan Buys Up Bargains And Widens Its Influence”, by Keith B. Richburg”, 22 January 1998, Washington Post Foreign Service, P A23, available at <https://www.washingtonpost.com/wp-srv/inat/longterm/china/stories/taiwan012298.htm>.

2001, former restrictions on the high-technology industry were lifted allowing investments above \$ 50 million (in US dollar). In spite of being the opposing political party, this policy aim manifested the economic-driven self-identification and pursued investments along the region to increase Taiwan's economic influence.

5.3 South or not South: Foreign Policy Agenda under Ma Ying-Jeou

After the DPP-affiliated president Chen Shui-bian was succeeded by Ma Ying-jeou 馬英九 (*1950, 2008-2016) from the KMT, the policy focus regarding the southbound agenda shifted twice. In the first period of his presidency, Ma turned his eye on Mainland China. The Taiwan-based scholar Fu-Kuo Liu frames the political heritage of Chen Shui-bian regarding Mainland China in his quite devastating words as “years of suffering a bitter relationship with the flamboyant Democratic Progressive Party (DPP) government in Taiwan“ (Liu 2014, p. 140). Obviously, he supported Ma's policy agenda, who “resumed links with Mainland China and started a rapprochement across Taiwan Strait” (Liu, 2014, p. 139). Most prominent was the successful negotiation of the Economic Cooperation Framework Agreement (ECFA) in 2010. During Ma's presidency, the economic cooperation with Mainland China and Hong Kong accumulated up to 40 per cent. The economic dependency towards China has been sensitive. Critics voiced their concerns about Ma's inability of leadership skills and the failure of drafting a new national security strategy (Liu, 2014, p. 147, 151). With regard to the territorial disputes in the South China Sea and over the Diaoyu Island that escalated once again during Ma's presidency, “the Ma administration has been left floundering and indecisive.” (Liu, 2014, p. 151).

While the rise of the PRC emerged as yet another condition that impacts the new world order, the economically strong player increased its pressure on Taiwan's international partners. Still, according to Chu, under the former presidents Hu Jintao 胡錦濤 (*1942,2002-2012) and Ma Ying-jeou a sort of ‘diplomatic truce’ was reached implying as “long as Taiwan does not pursue independence, Beijing will not seek to reduce

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further the number of states that maintain diplomatic relations with Taiwan” (Chu, 2014, p.168). Shortly after the leadership changes, this truce came to an abrupt end. Meanwhile, Taiwan lost formal diplomatic support. Malawi (2008) and Gambia (2013) have ended their official recognition for the Republic of China (R.O.C., Taiwan).⁵ Presumably, after the leadership change among the Chinese Communist Party—ultimately transferring to Xi Jinping’s 习近平 (*1953, 2012-) taking post after 2012—concerns grew and Taiwan’s foreign policy widened towards the south. At last, during the later period of Ma’s presidency again Taiwanese firms intensively relocated their investments towards Southeast Asia. In light of the main focus of cross-strait rapprochement, the suggestions of the ASEAN plus 3 plus 1 (ASEAN +4) served to benefit Taiwan’s trade investments among member state. Domestically the liberal foundation of going south prevailed.

As derived from the historical context, the southward-directed agenda shows two drivers: the prospect of economic gains and the reduction of dependency of Mainland China through economic incentives. Both drivers reveal a self-identification linked to economic conduct, either as an economic powerhouse derived from the historical success of having been part of the Tiger States or as an economy of a liberal democracy. This indicates the implementation of being a reliable (economic) partner. Over the course of time, derived from that southbound looking foreign policy, the self-identification of an economic developer regarding its Asian partners ingrained in the role identity. Entering the millennium, this self-identification has become a part of the ontological Self and an integral part of the underlying role identity for the national role conception. In sum, the former southward looking policies manifested the economic-driven Self. Skipping to the current presidency under Tsai Ing-wen, the renewed southbound agenda proclaims new features beyond that economic-driver.

5 Panama, El Salvador, Burkina Faso among others followed during the presidency of Tsai Ing-wen.

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Chart 1: Overview of Going South since 1990s

<i>Time</i>	<i>Policy</i>	<i>Context</i>	<i>Policy Aim</i>
1993/4-1996	Southward Policy “Go South”	Linked to the ASEAN initiated economic measures for market liberalization in 1992. Lee Teng-hui (KMT) first followed this calling ⁶	Reduction of economic reliance on the Mainland and increase of FDI to boost growth dependent on ASEAN Countries
1997-1999	Southward Policy “Go South”, Second term	Former President Lee Teng-hui (KMT) re-launched a second period of the southwards policy in midst of the Asian financial crisis	Taking advantage of the crisis to benefit Taiwan’s relations with ASEAN by investing into them, i.e., through the Southeast Asia Investment Company
2002	“Go South” Strategy (Revival)	President Chen Shui-bian (DPP) at that time launched a strategic southbound policy mostly to foster economic integration after Taiwan acceded the WTO in 2002	In addition to the former policy aims, the economic investment aimed to increase Taiwan’s economic influence.
2008/ - 2012	ASEAN-prone outreach	Ma Ying-jeou (KMT) focused on ECFA suggested the ASEAN plus 3 plus 1 (ASEAN +4) policy to benefit Taiwan’s trade investments among member state. After the leadership change of the PRC, Taiwanese firms shifted their investments from PRC to Southeast Asia	The aim of ECFA was to strengthen the cross-strait relations by furthering economic trade. FDIs were redirected from PRC to the region and sought for cheaper production cost

⁶ Yet the policy of regional investments abruptly ended in 1996 in anticipation of the coming financial crisis of 1997.

5.4 Analysing the Contestation by Promoting the NSP

While Taiwan's foreign policy role was facing a new normal due to a changing international environment, again, Tsai's administration set sail southward. In 2016, Tsai's government presented Taiwan's "New Southbound Policy" (*Xin Nanxiang zhengce* 新南向政策, NSP). The aim of the programmatic orientation is not only to strengthen economic cooperation among 18 countries in Southeast Asia and members of ASEAN, but also to deepen civil and diplomatic relations. Beyond the scope of pursuing the people-to-people agenda by means of education or tourism, the NSP also aims to establish links on local and city levels (Black 2019, p.256). Partners of the NSP are composed by a diverse cultural community and include Vietnam, Singapore, Myanmar, Malaysia and India, as well as Australia, New Zealand, Pakistan and Sri Lanka. By doing so, the Tsai administration reflects also the changed international environment as it shifted towards a new normal. The contextual change demanded to include much broader geo-strategic objectives and gave further incentives to alter the former narrative. Against the background of growing tensions across the Strait due to the growing assertiveness that originated from Beijing's foreign policy attempts, i.e., to isolate Taiwan internationally (Englund, 2022), the Beijing's policy behaviour functions as an external-driven incentive that furthered to derail the common narrative of going south. Yet, this contribution views this as contextual change that nurtured the domestic debate on political beliefs and attitudes in regard of shaping Taiwan's self-identification. According to the theoretical approach applied here, external drivers condition the internal process of contestation, yet, they are not viewed as direct causes for the direction of how the former southbound policies gets contested. In addition, the outcome of the policy or result of conduct might reify the intention, yet, cannot be included as the source of the construction. After implementing the NSP, the US-China competition also favoured a more comprehensive agenda for Taiwan, that includes security objectives in the Indo-Pacific region and has later led to the establishment of Development Assistance Coordination Mechanisms.⁷

7 Although established after drafting phase of the NSP, the Taiwan-Asia Exchange Foundation

As integral part in the drafting stage, one of the promoted new traits is to go beyond economy in order to foster cultural exchange and people-to-people relations. The governmental webpage states that NSP “has been adopted in order to identify a new direction and a new driving force for a new stage of Taiwan’s economic development, to redefine Taiwan’s important role in Asia’s development, and to create future value.”⁸ Aside from trade cooperation (*jingmao hezuo* 經貿合作), the NSP entails education promotion (*rencai jiaoliu* 人才交流) with attractive training and exchange programs including short-term research grants and cooperation promotion of ‘common goods’ (*ziyuan gongxiao* 資源共享). This regards cultural exchange in general as well as the improvement of medical care and the spread of medical technologies in particular. The comprehensive approach of the revised NSP shows in the five flagship programs and three innovative fields that complement the NSP.⁹ In contrast to the former southward-directed policies, the NSP claims to forge bonds far beyond economic exchange rates. Conor Stuart reduced the ‘new’ under Tsai’s administration is to redirect policy, such as cash flows and tourism,¹⁰ so that a previously outgoing policy turns incoming to benefit Taiwan’s demands. Economy-wise, this means on the surface to attract South Asian investors instead of investing abroad or arranging educational schools abroad to bring knowledge home. In a much deeper sense, for Taiwan’s foreign policy the calculus of gaining soft power outdoes economic gains. Beyond numbers, there is a clearly stated new incentive for DPP’s attempt of going south.

An underlying trait of the NSP strengthens Taiwan’s regional role. The Taiwan-based scholar Huang Kwei-Bo defines the five flagship programs of the NSP as, “*regional agricultural development, medical and*

(TAEF) was founded in 2018 and contributed greatly with their publications on monitoring the policy outcome ever since. The development during Tsai’s presidency broadened in reach and scope, as the research report of TAEF on “Assessing Trends and Demand Signals for Taiwan’s New Southbound Policy and Building a US-Taiwan Coordination Mechanism” demonstrates. For further information on conduct and cooperation outcome see <https://www.taef.org>.

8 Refers to <http://www.newsouthboundpolicy.tw/index.aspx>.

9 The five flagship Programs center on agricultural development, medical and public health cooperation, talent cultivation, innovative industries and youth exchanges and policy forums, as illustrated by the CSIS report, 2019, available at <https://southbound.csis.org>.

10 He illustrated this points based on a presentation held by the consultant Hsu Chun-fang for the Chinese National Federation of Industries (ROC), retrieved March 12, 2018, from http://en.naipo.com/Portals/0/web_en/Knowledge_Center/Feature/IPNE_161028_0703.htm, 28.10.2016.

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public health cooperation and the development of industrial chains, industrial talent development, industrial innovation and cooperation, as well as the New Southbound Policy Forum and youth exchange platform.“ (Huang, 2018, p. 55). All of which entail a stronger focus on exporting Taiwan’s self-defined strength in building on innovation by policy agenda and by including broader actors of the civil society, such as educational institutions and science parks or medical suppliers (e.g., cooperation on medical equipment). In contrast to previous advances, the NSP aims for a greater regional integration and to build on Taiwan’s strong innovation industry. Under the ‘Regional Link’ (*quyu lian jie* 區域連結) the cooperation should also be institutionally secured. Although Huang acknowledges that the NSP might not lead to more formal participation, “it can facilitate Taiwan’s presence in and link to these regions and re-position Taiwan in a more strategic place with fewer political barriers.” (Huang, 2018, p.51). The establishment of an international cooperation company was planned for the exchange in the agricultural sector and, again, by re-routing trade ties from Mainland China to other countries in order to diversify dependency. This attempt also corresponds with one of the five flagship programs under the NSP that targets agricultural development in particular and combines Taiwan’s advances in farming with innovative technological approaches (One prominent example for the policy outcome is the Modern Agricultural Demo Farm in Karawang that is a core project of the cooperation with the Indonesian Ministry of Agriculture).¹¹ Besides the manifestation of the narrative of Taiwan’s innovative self through knowledge transfer of technology, an economic-driven aspect remained under the regional scope of the NSP. In 2016, Ma Tiewing was concerned with China’s decreased growth rate, and emphasized Taiwan’s market dependency, “*China’s slowdown, rebalancing and rising wages are prompting Taiwanese firms to adjust overseas strategies... Asean markets are attractive, thanks to strong growth, low-cost labor, and ongoing reforms and economic integration*”, according to Roman (2016).

11 For more information on the cooperation project and Taiwan’s attempt to support the Indonesian development in regard of upgrading agricultural technology see the government webpage on “Taiwan and Indonesia cooperate on a Modern Agricultural Demo Farm in Karawang; Core farmers and officials from the Demo Farm come to Taiwan for training”, (02. November 2018) at https://eng.moa.gov.tw/theme_data.php?theme=eng_news&id=543.

The expansion of cooperation in the field of tourism was specifically designed to deepening long-term transnational and interpersonal relationships among the addressed countries. A measure taken to facilitate the deepening of relations was to ease visa restrictions from addressed nation states in Southeast Asia (Thornton, 2017). In addition to the Five Flagship Programs, the NSP pursued three innovative fields of which tourism is one. An explicit goal is to reify Taiwan's social innovative trait as inclusive and open. Against this background, the government took measures to mark Taiwan as Muslim-friendly destination.¹² The reasoning for this policy trait of the NSP might have been also originated from the fact that Taiwan experienced an influx of migration between 2009 and 2017 from South Asian and South East Asian countries of close proximity, including a high proportion of Muslim background.¹³ However, the employment structure of migrants from these countries manifest rather a downside of Taiwan being a socially inclusive society, as most of them are employed beyond the innovative industry sector.

On a conceptual basis, the NSP aims at making a difference. President Tsai calls for “substantive cooperation” (*shizhi hezuo* 實質合作). On November 15, 2016, President Tsai gave her remarks at Taiwan-ASEAN Dialogue and named three main objectives, “*The first is to strengthen mutual understanding. The second is to steadily expand two-way exchanges. The third is to forge strong and comprehensive partnerships.*”¹⁴ In this statement she highlighted these new characteristics in making foreign policy with the addressed partners by emphasizing “the mutual understanding”, “two-way exchange” and the “comprehensive partnerships”. She elaborated further that the mutual approach pursues a two-way street to go beyond governmental departments by promoting “mutual visits by senior officials”, so that they “build a new kind of

12 As prominently outlined in the description of the NSP, see also “Three Innovative Fields”, <https://southbound.csis.org>.

13 According to Integral Human Development 797,122 foreigners or 3,4 per cent of the population were in registered in 2020. Whereas the primary country of origin was Indonesia with 32 per cent, Vietnam with 30 per cent and the Philippines with 19 per cent. However, most of them took employment in the productive sector (66 per cent) and 45 per cent were even employed in the 3D industries, that are regarded as dirty, dangerous, and demeaning. For the detailed information see the Country Profile on Taiwan, July 2021, available at <https://migrants-refugees.va/country-profile/taiwan/>.

14 President Tsai made this remark at the Taiwan-ASEAN Dialogue on 15. November 2016, retrieved March 14, 2018, from <http://english.president.gov.tw/NEWS/5022>.

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partnership” including “bilateral and multilateral exchanges, in culture, tourism, medicine, science and technology, agriculture and other domains” (ibid). The later established cooperation mechanisms reflect this agenda of substantive cooperation.¹⁵

One way to implement this new trait in people-to-people relations is by deepening the cooperation between think tanks. She said that they “firmly believe that they are the best connectors between nations and peoples” (ibid). The strengthening of sustainable ties of trustful and lasting cooperation becomes the core and with it by self-description the narrative shifted towards a *genuinely* different trait. By this mutual two-way approach, she also reveals a new way of perspective of Taiwan’s self in regard of interacting with others.

Building on the understanding of being a role model among East Asia, the NSP started to promote innovation as a key driver for cooperation. Over the last decades, Taiwan has received positive responses among Asia and the West for its remarkable developmental agenda. Taiwan ranks 11th in comparison by the World Economic Forum (2018) regarding its innovative economy. That makes Taiwan one of the most innovative countries among the NSP partners. Taiwan delivers 64 per cent of semiconductors counted by world market share. The program for Industrial Innovation and Cooperation promotes the Five-Plus-Two Innovation Industrial Initiative.¹⁶ According to the official webpage, the shift towards a new commercial model “will stimulate innovation, boost the competitiveness of industry and increase corporate profitability” and will result in a “more balanced development to all regions of Taiwan.”¹⁷ For the Ministry of Economic Affairs that means to “utilize Taiwan’s economic assets toward strengthening the NSP” and build on elements, such as the “Asian Silicon Valley” which is the label of the Taoyuan industrial park. The idea is to develop this park into a “hub of innovation for domestic enterprises, as well as a testing ground for projects

15 See also the monitoring reports from the TAEF think tank (see fn. 7 above).

16 Five-Plus-Two Innovative Industries Initiative” regards IoT, biomedical, green energy, smart machinery, and defense in addition of new agriculture and the circular economy as the plus two.

17 See the webpage <https://english.ey.gov.tw/iip/B0C195AE54832FAD> , retrieved February 24, 2023.

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and technologies that are tailored to the need of NSP target countries” (Glaser, Kennedy & Mitchell, 2018, p. 59).

A year after the proclamation of the NSP, President Tsai picked up the new narrative of innovation and claimed the following for Taiwan at the National Day Address:

“We want to place Taiwan at the forefront of promoting innovation and progressive values across the Asia-Pacific. As we welcome official and non-official participation from every country, we look forward to discussions on regional development, environmental protection, medicine and health, religious freedom, free markets, and multiculturalism. All of this will create a more sustainable environment for innovation in Taiwan and the world.”

(Tsai Ing-wen, President Tsai delivers 2017 National Day Address).

In total, seven agencies and ministries are involved in Industrial Innovation and cooperation under the NSP.

Presumably, the recognition of Taiwan’s strong ICT and innovation technology industry, such as semiconductors, supports the constructed narrative. Innovation beyond economic incentives provides attractiveness for countries to follow Taiwan as an ideal and by doing so building on like-minded cooperation. The innovative for-runner position is basically derived from Taiwan’s long-term ties along with the Western world it identifies with and the beneficial position Taiwan holds within East Asia. Hence, in contrast to former domestic (economic) gains, Taiwan’s new trait of an innovative Self-identification is placed in relation to others. The positive response is not limited to produce innovative technology in digital industrialization, but also includes concepts of social innovation, such as promoting an integrative society across religion, gender and culture, as well as implementing elements of digital democracy.¹⁸

¹⁸ Although the completion by reification of Taiwan’s role as innovator is not explicitly part of this study, the fact that the think tank and innovation hub ITRI is recognized among the top 100 global Innovators in 2022 serves as one example. See Formosa News Webpage, 21 April 2022 at <https://english.>

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From the above mentioned, we can draw that the existing economic relationships became comprehensive in scope of trade sectors and cultural cooperation. A much deeper approach regarding topics, such as medical and public health, an inclusion of citizens and personnel, accounting for extensive educational and academic exchange, and the building of new industrial branches for promoting digitalization supported the creation of Taiwan's innovative development. Induced by the government under DPP's leadership, the NSP agenda contested the former southbound approaches and put forward the narrative of the innovative Taiwan. Taiwan's self-identification shifted by introducing this new narrative about the self and contested the previous role identity. Hence, it moved from a mainly economic-driven to an innovation-driven Self. After almost two-terms in practice, the new turn to comprehensive relations within Southeast Asia and among ASEAN members show effects.¹⁹ The new constructed self-identification as innovator grew even beyond the regional scope, including topics of regional security or coordination mechanisms for the Indo-Pacific security framework. Examples, such as the global importance of semi-conductors by TSMC, indicate that Taiwan's new role as innovator will be reified in foreign relation's conduct, yet, to estimate the extent and success of the new role analytically remains for future research.

ftvnews.com.tw/news/076952070D55448BE7CD264DB0F74295. The advances in green technology, such as offshore wind farming or hydrogen, are recognized by Australian political actors and companies, reifying the innovative trait of Taiwan's new role. See for example the Australian-Taiwan Hydrogen Trade and Investment Dialogue, 29 July 2021, at https://australia.org.tw/tpei/aus_tw_hydrogen_trade_investment_dialogue_rep_bloomfield_remarks.html, retrieved November 30, 2023. The image of Taiwanese businesses regarding electronics, digital and communication services in Thailand as TAEF reported on 28 December 2021, available at <https://www.taef.org/doc/974>, retrieved November 30, 2023. An example of reifying Taiwan's innovative characteristic beyond the member states of NSP is the recognition of Taiwan's importance to the global supply chain, see for example the impact assessment "The European Union, Taiwan and Global Supply Chain Security" by J.-C. Gottwald, S. Weil und M. Taube, November 2022, available at https://reinhardbuetikofer.eu/wp-content/uploads/2022/12/EU-Taiwan-Studie_digital_final.pdf, retrieved December 12, 2022.

¹⁹ For further information see the monitoring reports on Taiwan's foreign relations with regard to the NSP provided by TAEF at <https://www.taef.org>.

6-What are the features of the role of an innovator drawn from the study of Taiwan?

By analysing the narrative of the NSP, the study seeks to introduce Taiwan's role conception of the role of an innovator. The newly elaborated NRC originates from a process of contesting the former southbound policies and resulted in a shift of Taiwan's self-identification as an innovative actor. The paper now proceeds to introduce the analytical frame of the role of an innovator by taking the features exemplified by Taiwan's governmental NRC and role conduct.

A role is defined by an actor's social position within a group. The social position of the innovator regards primarily the position among Asian countries addressed by the NSP. Derived from the study of Taiwan's role emergence/formation, the role of an innovator describes a social position that relates to others as a pioneer or fore-runner in a field of innovation technology and innovative approaches of work processes, such as digitalization of industrial development, and might entail traits of social innovation, too. The role is characterized in that field as superior or further developed compared to others, yet it entails the trait of an educator or even a role model to level up to. Hence, the enacting of the role comes with internal and external-driven expectations in regard of the NSP countries. The external expectation regarding the role of an innovator, yet, need to be further evaluated in future research. Given the feature of a comprehensive (civil) approach of the role of an innovator, further research is needed to flesh out the external expectations and should include a systematic assessment of civil actor's responses from among the interaction.

The self-referred expectation promotes an ongoing improvement to provide a breeding ground for further research and development. Most of them are outlined in the Five+2 Innovative industry plan, that "will serve as the central driver of Taiwan's industrial growth in the next era".²⁰ As the Startup Island Taiwan Report 2021 points out, the exist-

²⁰ For quote see the innovative industry plan webpage at <https://english.ey.gov.tw/iip/B0C195AE54832FAD>, retrieved February 24, 2023.

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ing corporate industries have not only started to invest in the domestic startup ecosystem, but also observed that they “have become more open-minded towards innovation” (2021, p.34). Based on the innovative mindset as a process, they state further on, “with the strong semiconductor and technological foundations, we foresee a bright future for Taiwan corporate innovation scene.” (Startup Island Report, 2021, p. 34). According to the new self-identification, Taiwan is expected to live up to its ideals and improve the domestic environment as breeding ground and sandbox. The wide application of innovative approaches, such as promoting smart grid, a digital industrialization, green energy or even an open government²¹ are elements that manifest the contested narrative and new role identity.

While the bar for external role expectation is not minor. The role of an innovator is by self-declaration expected to allow others to participate in this process, for example, by sharing knowledge in dialogue among like-minded countries. Over two terms of conduct, this scope has even broadened to the world. By self-declaration of the Startup Island Taiwan, a brand to promote Taiwan-based startups, the arena outgrew the NSP members towards international Community (Startup Island Report 2021, p. 2).

The function of the role of an innovator is self-prescribed as providing innovative developments in the industrial sector and beyond. One aspect of this role conduct is therefore to support the startup ecosystem for innovation. As claimed by the Startup Island Taiwan Report 2021, “the fastest and most efficient way to engage upon digital transformation for corporations is to work with startups, adopt their innovative technologies, and most importantly incorporate their entrepreneurial spirit into their corporate culture and business (2021, p.34). The innovator therefore provides a platform for showcasing and mutual learning. As promoted by the NSP, one characteristic of the innovator role is to attract others via this innovative trait. One feature became the innovative society that is characterized by a mutual understanding and openness.

²¹ For example see also the “Taiwan Open Government National Action Plan, 2021-2024”, launched in January 2021, available at <https://gec.ey.gov.tw>.

The NSP pursues to attract talents and to create opportunities, i.e., by increasing the number of exchange students to work in a multinational context (cf. Tsai, 2017), or for immigrant children of a diverse religious and cultural background (Glaser, Scott & Mitchell, 2018, p. 42). By doing so, the role of an innovator relates to a liberal mind-set and carries educational and (social) inclusive traits.

7 Concluding Remarks

Taiwan has emerged as an innovative actor and is taking up a pioneering role in facing 21st Century's megatrends. The origin of Taiwan's strength seems to derive from the specific combination of innovation and social inclusiveness that brings about new key features of the self-identification. This contribution applied a constructive role theory approach to understand the process of how a former role got contested by Taiwan's turn for innovation proposed by the representative of the government, President Tsai Ing-wen. By actively promoting the NSP, the former southbound outlook got domestically contested and reached out to the addressed members of the NSP in order to recognize a renewed self-identification to complete the process of role transformation. The reification of the addressed partners exceeded the limits of this contribution, yet, examples of interaction under the NSP indicate the plausibility of the applied theoretical approach. The new narrative of the NSP deliberately constructed a national role conception that emphasizes Taiwan's innovative characteristics. Although several elements of the former Southbound Policies stayed intact, e.g., economic conduct, the narrative changed in substance and depth. In the process of contesting the historical self by an actively promoted narrative, a new role conception emerged from the shifted self-identification of Taiwan as innovator. The features outlined above can nurture further research on innovative countries that undergo similar processes of domestic contestation when they align to previous policies and actively promote a new Self due to the awareness of facing complex circumstances that create a different role context. In the case of Taiwan, role theory allows the inclusion of relational aspects, such as the interactive identification in role formation

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beyond the definition of sovereignty or nationhood. Hence, the research design of role theory seems beneficial to the case of Taiwan to understand the social constructive depth and impact of the pursued NSP and its lasting effects by forming a role identity.

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