

ISSA Proceedings 2006 ~ An Analysis Of Preschool Hebrew Speaking Children's Arguments From The Perspective Of The Pragma-Dialectical Model



1. Characteristics of Children's Verbal Arguments

Verbal arguments are part of young children's normal activity and are usually "rule governed and socially organized events" (Benoit 1992, p. 733). Researchers have concluded that they have a positive effect on friendships and cognitive development (Corsaro 1994, Dawe 1934, Garvey 1993, Green 1933, and Shantz 1987). Corsaro (1994, p. 22) states "disputes provide children with a rich arena for development of language, interpersonal and social organization skills, and social knowledge." In fact, O'Keefe and Benoit (1982) see argument as part of normal language learning. Piaget (1952, p. 65) states "[i]t may well be through quarrelling that children first come to feel the need for making themselves understood".

Children's arguments are generally short in duration. For example, Dawe (1934) found that on average quarrels last 14 seconds, while O'Keefe and Benoit (1982) found that young children's disputes consisted of an average of five turns. Although these disputes are not long in duration, they are powerful events. Once a dispute has begun, "any prior goal or task is abandoned and the attention is directed to resolving the incompatibility" but "[o]nce the conflict is resolved, play can once again be resumed" (Eisenberg and Garvey 1981, p.151). These verbal disputes can be considered as "side-sequences" (Jefferson, 1972), important at the moment, but with no lasting effect on interaction.

2. The Study and Research Question

This paper will report on ongoing research investigating the verbal arguments of Hebrew speaking pre-school children. The data for this research was transcribed from videotapes of fourteen triads of pre-school children at play in a playroom

that was set up for the purpose of the study. The children are also in daily attendance at the same pre-school. The subjects' ages ranged from 4 years six months to six years five months, however the maximum age differences of the children in each individual group was usually around six months. Children above the age of four were chosen since by this age normally developing children have acquired the basics of their language system (Brown, 1973). The children were all native speakers of Hebrew. While the children conducted their talk in Hebrew it was transcribed and translated simultaneously into English by the author.

While this is an ongoing study with a number of research questions, only one of these will be related to in this paper. This question is presented below:

Is the process of Israeli preschool children's arguments consistent with the pragma-dialectical model of van Eemeren and Grootendorst (2004)?

3. The Pragma-Dialectical Model (van Eemeren and Grootendorst 2004)

By using the pragma-dialectical model for critical discussion to reconstruct an argument, we are able to see its deeper structure. Since the model is informed by speech act theory (Searle 1976), this will allow for the investigation of both the children's pragmatic ability and of their ability to sustain an argument.

The model has four discussion stages. These are confrontation, opening, argumentation, and concluding. In the confrontation stage, it becomes clear that there is a difference of opinion. In the opening stage the parties "try to find out how much relevant ground they share (as to the discussion format, background knowledge, values and so on)" (van Eemeren and Grootendorst 2004, p. 60). In the argumentation stage protagonists advance their argument, and if antagonists are not convinced, they will give further arguments, and finally in the concluding stage the argument is resolved to the satisfaction of the protagonists and the antagonists. Nevertheless, van Eemeren and Grootendorst recognize that this is an ideal model and that not all arguments go through all four stages, nor do all arguments go through the stages in order.

Searle (1976) distinguishes five basic kinds of speech acts. These are assertives (also known as representatives), directives, commissives, expressives, and declarations. Assertives are statements of fact that may be either true or false such as "But somebody needs to sleep in the bed" (the examples are from the corpus of the study). Directives are requests or commands, which can be made directly ("give it back to me"), or indirectly ("Do you want three buildings [I will

give you a building if you give me the block]”), questions are directives as well. Commissives commit the speaker to “some future course of action” such as a promise or a threat, for example, “I will be your friend [if you give me the block]”) (Searle 1976, p. 11). Declarations must have some kind of official backing and authority such as a judge sentencing a criminal to a jail term, or in our case “I am (King) David, who solves the problems [(if you come to me I have the authority to solve your problems)]”). While declarations have no place in the model, van Eemeren and Grootendorst do suggest a sub-type of speech act that they call ‘usage declarative’. Usage declaratives are definitions, specifications, amplifications and explanations to help the listener understand other speech acts (“There are two, two [J don’t accept what U says, there are only two buildings]”). Different kinds of speech acts are used in the four stages to bring the argument to resolution. While participants in an argument may use expressives, these do not aid in advancing an argument; only assertives, directives, and commissives are relative to the resolution of an argument.

4. Analyses of Two Verbal Arguments

Two verbal arguments will be analyzed below from the perspective of the pragma-dialectical model. The first is an argument between two boys. J is who is four years and nine months old is the protagonist, U is who is five years old is the antagonist. In addition, A who is four years and six months old is a participant observer who tries to clarify an error in U’s argument. The boys had previously divided the room into J’s territory and A and U’s territory. This behavior is very common in the play behavior of young children (Ariel and Sever 1980). J is building with large wooden blocks in his area of the room; there are two separate buildings in J’s area. U wants a block J is holding in his hand. Disputes over object possession are very common among children. In fact, the majority of disputes among English speaking children are over object possession. (Dawe 1934, Eisenberg and Garvey 1981, Howe and McWilliam 2001).

Argument 1

J is building with large wooden blocks. U wants the block that J has in his hand. A tries to clarify the facts.

Length: 30 seconds

Number of turns: 13

Stage	Turn	Speaker	
I1	1	U	Is it possible to take this? (directive-direct request) I will be your friend. (commissive)
I1	2	J	No (commissive-rejection)
III1	3	U	J, if you are with us you will have three buildings. (commissive/assertive: a promise of friendship and a promise of three buildings instead of two in exchange for the block)
	4	A	There are two. (usage declarative)
I2	5	U	Do you want three buildings? (directive-indirect request)
	6	A	No, there are two buildings J. (directive-warning—The exchange of a third building for a block is a fallacy since the third building does not exist.)
I2	7	U	No, I want three. (commissive) Do you want three buildings? (indirect request for the block)
III2	8	J	I already have two. (assertive)
I3	9	U	Do you also want three? (indirect request for the block)
IV3	10	J	Yes (commissive: By accepting U's offer, J has made a commitment to give U the block.)

Argument 1a

IV3	11	U	So, give me. (direct request- U now requests the block in exchange for friendship and a third building.)
14	12	J	I do not want three. This is enough for me. (J interrupts U after U says give and uses two assertives.)
	13	A	Two (assertive)

Argument 1b

In turn one U uses a directive, making a request for the block. To make the request more attractive he adds a promise of his friendship and uses a commissive. This is the confrontation stage. It is now up to J to accept or reject the offer. When he says “no” he refuses U’s request and also performs a commissive. This is still the confrontation stage. Now, the players may move on to the opening stage. Yet, they leave this stage out and move straight on to the argumentation stage. U makes J an offer of A’s friendship as well as his own by performing a commissive and making an assertion that J will have three buildings if he allies himself with U and A. Nevertheless, A sees U’s mistakes and points out that there are only two buildings. This can be seen as a usage declarative since it is an attempt to help J understand that U’s offer is flawed – there really are only two buildings. In turn 5 there is a second confrontation and U uses an indirect directive by asking J if he wants three buildings (in exchange for the block). U does not need to make a direct request for the block again since according to the “Rule of Reinstating Request” (Labov and Fanshel 1977, p. 94) once a request has been made (turn 1) it is in effect and does not need to be restated. Again A feels

the need to correct U. This time he uses a directive in the form of a warning to J. Now U commits himself to wanting three buildings, and again asks J to be with him and A so U can have three buildings and the block. J goes on to the argumentation stage and uses an assertive when he says he already has two. Again U asks J if he wants three buildings. This is the third confrontation. He is again requesting the block in exchange for three buildings and friendship. Now we come to the concluding stage when J finally says, "Yes" and agrees. U again requests the block for the fourth time by asking for it directly ("so give it to me") since J has finally committed himself. In the next turn J rejects U's requests by using assertives - "I do not want three" (and I do not want to give you the block or be your friend) "This is enough for me" to make his point. This is the fourth confrontation in the argument, but the argument does not continue since U has either given up or lost interest and walks away. Another explanation for U's not continuing with the argument is J's interruption in turn 12. Lein and Brenneis (1978) found that among white American middle class children simultaneous speech during a dispute would bring the argument to an abrupt halt. Finally, A cannot resist and must get in the last word (two).

To reveal the deep structure of the argument van Eemeren and Grootendorst (2004) propose making an analytical overview by performing analytical transformations. These include:

Deletion: of all those parts of the discourse or text which are not relevant to the resolution of the difference of opinion at issue.

Addition: of relevant parts that are implicit (unexpressed premises)

Substitutions: by the replacement of formulations that are confusingly ambiguous.

Permutations: require part of the discourse or text to be rearranged where necessary in a way that best brings out their relevance in the resolution process.

By using, deletion and addition, we can discover the structure of each participant's arguments in the above-mentioned argument. For example, the structure of U's argument and J's arguments can be represented in the tables below (adapted from van Eemeren and Grootendorst 2004, p. 122)

The Structure of U's Argument	Unexpressed Premises
1. U wants the block.	J should give U the block in exchange for his friendship.
2. If J gives U the block, he will have three buildings instead of two as well as U and A's friendship.	J should be willing to make the exchange since it is worthwhile.
3. If J agrees to accept three buildings and U and A's friendship, he must give A to block.	Once U states a desire for a third building and friendship, he should be willing to give up the block.

The structure of J's argument can be represented as follows:

The Structure of A's Argument	Unexpressed Premises
1. J does not want to give U the block.	U's friendship is not worth a block. Moreover, J knows that U is already his friend from previous experience.
2. Two buildings are enough for J. He does not want to exchange the block for an additional building, and A's added friendship.	U and A's friendship and a third building are not worth the block. J already has U's friendship, and there are only two buildings.
3. J agrees that he wants three buildings.	J accepts a third building and U and A's friendship. J does this so U will leave him alone, and J can continue playing.
4. J is happy with two buildings.	J does not want to give up the block.

The second argument is between M the protagonist, who is a six-year-old girl, and the antagonist H who is six years two months in age. Again, there is a participant observer. T is a boy who is six years and four months old and offers his services as a mediator. Again this is an argument over object possession, but unlike U who never received the object he desired, H does succeed in getting the object, in this case a toy screwdriver, away from M. This may be because of his persuasive skills or simply because he had had possession of the object originally. For example, Bakeman and Brownlee (1982, p. 108) found that the resolution of "possession episodes" among young children often had a social base and not a power base, that is previous possession of an object gives a child the right to that object. Bakeman and Brownlee refer to this as the "prior possession rule".

The preliminary stage of this argument begins when M declares that she has completely finished fixing the shelf. At this point in time H is playing with some clothes, which he and T found previously. He speaks to M and uses a directive and makes an indirect request for the screwdriver followed by a direct request. This is the first confrontation. When M replies with "What" she uses a directive for clarification. Again, the disputers could go on to the opening stage, but instead H uses an assertive that he considers a true fact and presents an argument (argument 1) of why M

a monologue. Finally even though M again uses a directive as a direct request she is ignored. If we look at the structure of each participant's argument we will see the following:

The structure of H's argument can be represented as follows:

The Structure of H's Argument	Unexpressed Premises
1. H needs something different to play with, so M should give him the screwdriver back.	Items on loan should be returned.
2. M should return the screwdriver, since she said she would.	You should keep your commitments.
3. The screwdriver is rightfully H's, and it should be returned with in the designated time frame.	The designated time frame is up, and the screwdriver must be returned.

The Structure of M's Argument can be represented as follows:

The Structure of M's Argument	Unexpressed Premises
1. M does not want to give up the screwdriver.	If H has to repeat his request, perhaps he will change his mind.
2. The screwdriver belongs to H, but M needs to finish the task at hand before she can return it.	The longer it stays in M's possession, the greater M's claim.
3. M returns to screwdriver, but she really has not finish her task.	M can try and get it back by demanding it back.

5. Discussion and Conclusions

If we compare the two arguments, we can see that they both leave out the opening stage. Perhaps this is due to the fact that the children are so well acquainted with rules of their mini-society that they are already aware of what they share together and, thus, find it unnecessary to elaborate further, or perhaps they are just too intellectually immature to engage in the opening stage.

In both arguments it seems difficult to find a solution that is satisfactory to all participants through argumentation. In the first argument the antagonist simply lost interest, and in the second argument once the antagonist had what he wanted

he went on to something else, while the protagonist was certainly unhappy with the outcome and tried to reopen the argument to no avail. Nevertheless, we can see that these pre-school children are capable of sustaining an argument from the confrontation stage until the concluding stage.

Furthermore, we can see the children do use the speech acts available to them according to the pragma-dialectical model to try and resolve their arguments. Thus, we can conclude that the process of the children's arguments is consistent with the pragma-dialectical model. However, perhaps more importantly for the study of child language is that by using the pragma-dialectical model we can see how children use various speech acts and organize their arguments.

Finally, the model is very useful in the understanding of the structure of each child's thought processes. Therefore, I have concluded that the model can be a valuable tool to help us better understand children's verbal arguments.

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ISSA Proceedings 2006 ~ Putin's Terrorism Discourse As Part of Democracy And Governance Debate In Russia



Abstract

This paper [i] presents a study of President Putin's use of the issue of terrorism in public debate in Russia. President Putin's speech made in the wake of the Beslan tragedy, on September 4th, 2004, is examined. The logico-pragma-stylistic analysis employed in the paper describes communicative strategies of persuasion employed by the speaker and investigates how the Russian leader uses the issue of terrorism to further his political goals. The terrorism debate is analysed within a wider context of democracy and governance debate between the President and the liberal opposition.

Key words: argumentative discourse, rhetoric, pragmatics, pragma-dialectics, fallacies.

This paper is a study of the use of the issue of terrorism in public debate in Russia. It examines President Putin's address to the nation in the wake of the Beslan terrorist attack, on 4 September 2004.

The study doesn't pretend to be an exhaustive treatment of the topic; rather it aims to present a logico-pragma-stylistic analysis of the speech, to identify communicative strategies of persuasion employed by the speaker, and to investigate how the Russian leader used the problem of terrorism to further his political goals. The terrorism debate is analysed within a wider context of the democracy and governance debate between the President and a liberal opposition.

In trying to persuade his or her audience a skilled arguer assesses the audience and the issues at hand. When composing a message the speaker takes into account of several factors: the medium of communication (electronic mass media, print media), topic of discussion, audience (gender, level of education, expertise in the topic under discussion, rationality/emotionality, degree of involvement in the problem, level of life threat presented by the problem, etc), nature of the discussion (i.e. whether it is a direct dialogue with an opponent in a studio or an indirect dialogue through electronic or print media), applicable conventions (e.g. parliamentary procedures), and finally a broader, cultural and political context in which communication is taking place including such elements as openness/restrictiveness of the political regime, moral dilemmas and cultural taboos existing in the society, and traditions of conducting discussions inherent in

the culture.

The process of assessment and adaptation of the issues to the audience establishes a communicative strategy of persuasion. The key decisions in a communicative strategy are to choose targets to appeal to and to prioritize them. While there are a wide variety of possible targets of appeal, it is possible to identify three major ones, people's mind, emotions, and aesthetic feeling. An appeal to people's reason or rational appeal is based on the strength of arguments. Emotional appeals arouse in the reader or listener various emotions ranging from a feeling of insecurity to fear, from a sense of injustice to pity, mercy, and compassion. Aesthetic appeals are based on people's appreciation of linguistic and stylistic beauty of the message, its stylistic originality, rich language, sharp humour and wit.

Rational appeals can be effective in changing beliefs and motives of the audience because they directly influence human reason, which plays a role in beliefs and motives. Emotional appeals are persuasively effective because they exploit concerns, worries, and desires — the arguer "speaks to people's hearts". Aesthetic appeals are persuasively effective when they change people's attitudes to the message and through the message to its author. By changing attitudes from those of disapproval or reservation to appreciation or even admiration, the author increases the recipient's susceptibility to persuasion. People will be more willing to accept the arguer's reasoning after they have experienced the communicator's giftedness as the author of the message (Goloubev 1999). The three components of the logico-pragmatic-stylistic analysis roughly correspond to these three major appeals of the argumentative discourse: rational, emotional and aesthetic.

Let us now turn to Putin's speech. The breakdown into paragraphs follows the version published on the official site of the President of the Russian Federation. The only amendments change the translation of some sentences to make the English follow more closely the original Russian, syntactically and semantically. The speech is divided into explicit parts; paragraphs are numbered to facilitate analysis.

4 September 2004

Moscow, Kremlin

Address by President Vladimir Putin

Part 1

1. Speaking is hard. And painful.
2. A terrible tragedy has taken place in our world. Over these last few days each and every one of us has suffered greatly and taken deeply to heart all that was happening in the Russian town of Beslan. There, we found ourselves confronting not just murderers, but people who turned their weapons against defenceless children.
3. I would like now, first of all, to address words of support and condolence to those people who have lost what we treasure most in this life – our children, our loved and dear ones.
4. I ask that we all remember those who lost their lives at the hands of terrorists over these last days.

Part 2

5. Russia has lived through many tragic events and terrible ordeals over the course of its history. Today, we live in a time that follows the collapse of a vast and great state. A state that, unfortunately, proved unable to survive in a rapidly changing world. But despite all the difficulties, we were able to preserve the core of that giant – the Soviet Union. And we named this new country the Russian Federation.
6. We all hoped for change. Change for the better. But many of the changes that took place in our lives found us unprepared. Why?
7. We are living at a time of an economy in transition, of a political system that does not yet correspond to the state and level of our society's development.
8. We are living through a time when internal conflicts and interethnic divisions that were once firmly suppressed by the ruling ideology have now flared up.
9. We stopped paying the required attention to defence and security issues and we allowed corruption to undermine our judicial and law enforcement system.
10. Furthermore, our country, formerly protected by the most powerful defence system along the length of its external frontiers overnight found itself defenceless

both from the east and the west.

11. It will take many years and billions of roubles to create new, modern and genuinely protected borders.

12. But even so, we could have been more effective if we had acted professionally and at the right moment.

13. In general, we need to admit that we did not fully understand the complexity and the dangers of the processes at work in our own country and in the world. In any case, we proved unable to react adequately. We showed ourselves to be weak. And the weak get beaten.

14. Some would like to tear from us a “fat chunk” of the territory. Others help them. They help, reasoning that Russia still remains one of the world’s major nuclear powers, and as such still represents a threat to them. And so they reason that this threat should be removed.

15. And terrorism, of course, is just an instrument to achieve these aims.

16. As I have said many times already, we have found ourselves confronting crises, revolts and terrorist acts on more than one occasion. But what has happened now, this crime committed by terrorists, is unprecedented in its inhumanness and cruelty. This is not a challenge to the President, parliament or government. It is a challenge to all of Russia. To our entire people. It is an attack on our country.

Part 3

17. The terrorists think they are stronger than us. They think they can frighten us with their cruelty, paralyse our will and sow disintegration in our society. It would seem that we have a choice – either to resist them or to agree to their demands. To give in, to let them destroy and have Russia disintegrate in the hope that they will finally leave us in peace.

18. As the President, the head of the Russian state, as someone who swore an oath to defend this country and its territorial integrity, and simply as a citizen of Russia, I am convinced that in reality we have no choice at all. Because to allow ourselves to be blackmailed and succumb to panic would be to immediately condemn millions of people to an endless series of bloody conflicts like those of

Nagorny Karabakh, Trans-Dniester and other well-known tragedies. We should not turn away from this obvious fact.

19. What we are dealing with are not isolated acts intended to frighten us, not isolated terrorist attacks. What we are facing is direct intervention of international terror directed against Russia. A total, cruel and full-scale war that again and again is taking the lives of our fellow citizens.

20. World experience shows us that, unfortunately, such wars do not end quickly. In this situation we simply cannot and should not live in as carefree a manner as previously. We must create a much more effective security system and we must demand from our law enforcement agencies action that corresponds to the level and scale of the new threats that have emerged.

21. But most important is to mobilise the entire nation in the face of this common danger. Events in other countries have shown that terrorists meet the most effective resistance in places where they not only encounter the state's power but also find themselves facing an organised and united civil society.

Part 4

22. Dear fellow citizens,

23. Those who sent these bandits to carry out this horrible crime made it their aim to set our peoples against each other, put fear into the hearts of Russian citizens and unleash bloody interethnic strife in the North Caucasus. In this connection I have the following words to say.

24. First. A series of measures aimed at strengthening our country's unity will soon be prepared.

25. Second. I think it is necessary to create a new system of coordinating the forces and means responsible for exercising control over the situation in the North Caucasus. Third. We need to create an effective anti-crisis management system including entirely new approaches to the way the law enforcement agencies work.

26. I want to stress that all of these measures will be implemented in full accordance with our country's Constitution.

Part 5

27. Dear friends,

28. We all are living through very difficult and painful days. I would like now to thank all those who showed endurance and responsibility as citizens.

29. We were and always will be stronger than them, stronger through our morals, our courage and our sense of solidarity.

30. I saw this again last night.

31. In Beslan, which is literally soaked with grief and pain, people were showing care and support for each other more than ever.

32. They were not afraid to risk their own lives in the name of the lives and peace of others.

33. Even in the most inhuman conditions they remained human beings.

34. It is impossible to accept the pain caused by such loss, but these trials have brought us even closer together and have forced us to re-evaluate a lot of things.

35. Today we must be together. Only so we will vanquish the enemy.

This message was delivered the next day after the end of the standoff between terrorists and Russian security forces during a school siege in Beslan, in Russia's southern republic of Northern Ossetia. There were more than 1,200 people taken hostage during the three days of terror. Nearly 340 people died, 176 of them children. More than 500 were wounded. A message posted on a pro-Chechen website afterwards confirmed what many believed: that the architect of the violence was Shamil Basaev, the most notorious of the Chechen militants. Russia was in shock.

Obviously such an emotional subject demands an emotional response from the country's President. Rightly, therefore, the speaker makes an emotional appeal a priority. The message is clearly meant to comfort and uplift, unify and instil confidence in the people. In Part 1 especially and throughout the text, we see expressions of sympathy and condolence. But who must these words comfort and uplift, in whom must they invoke hope and confidence? Who is the audience the

speaker addresses his message to? These questions are not as straightforward as they seem. The primary audience is not the people of Beslan whom the terrorist attack immediately affected (although they are mentioned in the concluding part of the speech). The primary audience is all the people of Russia. Even the town of Beslan is referred to as a Russian town rather than a Northern Ossetian town (2), which would have distanced it from the country as a whole. The recipients of the message are referred to as *fellow citizens* (22), *citizens of Russia* (23), and *friends* (27) but never as Ossetians.

This is done to achieve two objectives. On the one hand, it serves to indicate that Russians are a united nation (inspiring confidence). On the other hand, it acts to reinforce the identification of the speaker, the President of the country, with his audience, his fellow countrymen (expression of empathy). Several linguistic devices are employed to produce the said effect. One of them is the repetition of key words or phrases: the noun *Russia* and adjective *Russian* are mentioned 9 times in the Russian original text, the personal pronoun *we* and the possessive pronoun *our* in different grammatical cases are used a record 33 times. The phrases *we must be together,... only together* (43) are other key words that are repeated.

An interesting case to examine is the use of the word *people*, which is found in the text both in the singular and the plural form. Used in the singular (a) *people* refers to the whole Russian nation: *This is not a challenge to the President, parliament or government. It is a challenge to all of Russia, to our entire people* (16). In the plural the word *peoples* refers to various ethnic groups composing the Russian Federation: *Those who sent these bandits to carry out this horrible crime made it their aim to set our peoples against each other, put fear into the hearts of Russian citizens and unleash bloody interethnic strife in the North Caucasus* (23). In this sentence, Putin takes great care to emphasise that different ethnic groups living in the Northern Caucasuses are one nation. He does that by using an umbrella term *citizens of Russia* to refer to the people belonging to these ethnic groups. The speaker not only talks about a united Russia but emphasizes the country's greatness: *Russia is referred to as the core of a great state, the giant - the Soviet Union* (5), *as a country protected by the most powerful defence system along the length of its external frontiers* (10), *as one of the world's major nuclear powers* (14).

Having built up the idea of unity in Part 1 and Part 2, President Putin, at the end

of Part 2, introduces one of his main theses: *all of Russia is under attack* (16). Later he reinforces his claim: *What we are dealing with are not isolated acts intended to frighten us, not isolated terrorist attacks. What we are facing is direct intervention of international terror directed against Russia. A total, cruel and full-scale war that again and again is taking the lives of our fellow citizens* (19).

The message contains an important juxtaposition: Russia versus her enemies. And that is the only juxtaposition. There is no division within Russia itself: the State and the People are one whole.

Let us examine the rhetorical images of the opposing parties. The speaker creates an image of the Russian people as caring, courageous, humane people and juxtaposes this image with the enemies' image as *not just murderers but murderers of defenceless children* (2), *terrorists* (4, 16, 17, 21, and 27), *international terror(ists)* (19), and *bandits* (23). In fact, the speaker ends his message with the word *enemy* (35), which indicates the importance President Putin attaches to the concept. Describing the enemy the speaker avoids any mention of their demands to withdraw Russian troops from Chechnya. Interestingly, never once was the word Chechnya mentioned in the whole speech. This is done to remove any connection between Beslan and the ongoing conflict in the neighbouring republic. The speaker creates the impression that Northern Caucasus is currently a peaceful region and the bandits who committed the crime strive to spark a bloody feud between the peoples of the region similar to bloody conflicts in Nagorny Karabakh between Azerbaijan and Armenia, in the Trans-Dniestr Republic between this self-proclaimed, unrecognized state and Moldova it had been part of, and *other well-known tragedies* (18).

Putin's emphasis is on the international character of the threat that plagues the modern world, hence the mention of the popular term *the new threats* (20), the reference to other countries in the next paragraph (21), as well the implication that the bandits who carried out the crime did not act on their own accord but were sent by those abroad who masterminded the terrorist attack (23). Even more striking is the reference to world conspiracy of presumably foreign policy-makers who condone terrorism against Russia. Some of them condone it because they see an opportunity to chip away a "fat chunk" of Russian territory, others see in Russia, one of world's biggest nuclear powers, a threat to them, *the threat that has to be removed* (14).

As we have noticed before the message is of a highly rhetorical character. It abounds in stylistic devices which enhances its aesthetic appeal. Note the use of repetition of the word *we* throughout the text, parallelism of expression in Part 2: *we live in a time ...* (5), *we all hoped...* (6), *we are living ...* (7), *we are living ...* (8), and *we stopped...* (9). As William Strunk Jr. points out in his book *The Elements of Style* a good writer should express coordinate ideas in similar form. "This principle, that of parallel construction requires that expressions similar in content and function be outwardly similar. The likeness of form enables the reader to recognize more readily the likeness of content and function" (Strunk and White 1979: 26). Many important statements are expressed in very short sentences, which helps attract the attention of the audience: *And the weak get beaten* (13); *It is an attack on our country* (16); *Today we must be together. Only so we will vanquish the enemy* (35). The speaker deliberately breaks his sentences into two, which again allows him to repeat certain key words, achieve sharpness of expression and increase the aesthetic and emotional effects of the message: *Speaking is hard. And painful* (1); *We all hoped for change. Change for the better* (6); *This is not a challenge to the President, parliament or government. It is a challenge to all of Russia. To our entire people. It is an attack on our country* (16). The latter sequence is also an example of the afore-mentioned stylistic device of parallelism. Another stylistic device employed to enhance the aesthetic appeal is the rhetorical question *Why?* (6) The question allows the arguer to make a pause and draw the listener's attention to the points to follow.

Rational appeal appears to be the last target in President Putin's communicative strategy. This assessment is based on the number of sentences containing argumentation, which is comparatively small. As we have already mentioned, the purpose of the message is not to convince but rather to empathize and explain. As far as specific proposals for a course of action are concerned the speaker makes only a few blueprint points, leaving proper arguments for concrete proposals for a later message.

Having said that, the message does contain a clear line of argument whose purpose is to justify the tough line President Putin is pursuing towards Chechnya and vindicate his actions during the crisis. We have touched upon the first issue already. The 'other' clearly receives a biased representation: the perpetrators are not Chechen terrorists or Chechen militants but international terrorists. Hence any connection between Russian actions in Chechnya and the Beslan events is

invalidated. Consequently, the Russian authorities are cleared of any blame of at least provoking this atrocity. All the blame stays with the terrorists themselves. This constitutes the first fallacy the discourse contains, the fallacy of shifting the issue. Instead of presenting a true picture the speaker provides an interpretation of the events convenient for him.

Another fallacy the argue commits is that of a false dilemma in which a contrary opposition is presented as a contradiction (van Eemeren, Grootendorst 1992: 190). President Putin suggests in paragraph 21 that there appears to be a choice: to strike back or to give in to the demands of terrorists and to allow the terrorists to destroy and split up Russia, hoping that in the end they will leave Russia alone. In 22, he says, however, that in reality Russia simply has no choice: if the Russian Government gives in to the blackmail of the terrorists and start panicking millions of Russians will be plunged into an endless series of bloody conflicts such as the Armenia-Azerbaijan Karabakh conflict or the Moldova-Dniestr conflict. Therefore, only one avenue is open to Russia – hold strong and defend herself. The false dilemma is contained in the assertion that there are only two options that are in contradictory relation to each other: to give up the fight and let the country be destroyed or continue fighting and keep the country from breaking up. However, as opponents of the war in Chechnya point out there may be a third option, quoting at least one example of a peaceful resolution of a deep-rooted violent conflict through negotiations with terrorists, that of the Northern Ireland settlement. The British Government had made several attempts to enter into negotiations with the IRA before finally reaching a compromise that brought peace to Northern Ireland. Northern Ireland has not broken away from the United Kingdom as a result of this; the UK is still a united country. It is this third way – negotiations with terrorists – that is branded by Putin succumbing to the terrorists' blackmail.

Another fallacy committed by the author is evading the burden of proof by making an argument immune to criticism. Paragraph 18 concludes with a statement *We should not turn away from this obvious fact* that means that the point made is an obvious one and needs not be defended. Such a statement violates Rule 2 of the critical discussion rules developed in the pragma-dialectical theory of argumentation. "An obvious way of evading one's own burden of proof is to present the standpoint in such a way that there is no need to defend it in the first place. This can be done by giving the impression that the antagonist is quite

Implied Theses, and Implied Assertions. All these terms basically mean the same thing, an argued statement or point of view, but derive from different traditions of argumentation theory: the terms *claim* and *assertion* were introduced by Toulmin working within the framework of Procedural Informal Logic, while the term *thesis* was introduced by Aristotle belonging to the tradition of Classical Dialectic (van Eemeren et al 2001: 27-47). The purpose of assigning the implicit statements different names is to differentiate them in terms of argumentative importance and the degree of implicitness: ICs are the least apparent statements in the fabric of the message and therefore the justification of ascribing these statements to the speaker can be subjected to doubt more than any other implied statements; while the theses are hierarchically more important than the assertions because the latter are themselves arguments put forward in support of the former. Both the ITs and the IAs are but slightly paraphrased statements that are already available in the discourse.

It is also important to note that the ICs themselves form an argumentation which can be interpreted as leading to any one of them. However, in our opinion the most crucial IC for President Putin is IC1 and thus, it is IC1 that crowns the whole argumentation of the message. As we have already mentioned, Putin is engaged in an implicit debate with those in opposition to his regime over two main accusations. The first accusation concerns his actions during the siege that resulted in so many deaths: had the demands of the terrorists about the withdrawal of Russian troops from Chechnya been met the school would not have been blown up. The second accusation concerns the overall policy in and around Chechnya: it is this policy that has incited the terrorist act. The Russian President's reasoning develops along two main lines of argument. While the two lines are interwoven, as is shown in Figure 1 in which both lines of argument lead to the same implied claims, and the arguments supporting one line of argument serve the other as well, we can say that the second line of argument is shorter and more clear-cut. It terminates in the text in IT2 and points indirectly to all the ICs but most directly to IC2, IC3 and IC5. The first line of argument is longer and the statements involved in it are better substantiated in the message than those of the first one. The second argumentation terminates in the text in IT1 and while pointing to all the ICs most directly it supports the very important implied claims IC1, IC4 and IC5.

We have already touched upon the evaluation of the two lines of reasoning and

pointed out that the first one is weightier than the second. It is precisely the problem with Putin's argumentation: his *apologia* is not well enough argued. IC1, IC4 and IC5 are not proven to be the case. They lack solid explicit arguments in the message. However, to make this conclusion we must justify our reconstruction of the implicit elements in the argumentation including the ICs.

In our reconstruction of the structure of the author's reasoning we followed informal logic's approach to argument reconstruction, rather than formal logic's approach, for the following reasons. Van Rees (van Eemeren et al 2001) points out that while both informal logic and formal logic aim to isolate the premises and conclusion of the reasoning underlying an argument, the approaches differ in two major aspects. "First, for informal logicians, deductive validity is no longer necessarily the prime or only standard for evaluating an argument. One of the important issues in informal logic concerns exactly this question of the validity standard to be applied. Most informal logicians hold that some arguments lend themselves to evaluation in terms of deductive validity, while others may be more appropriately evaluated in terms of other standards. This issue has important implications for reconstruction. It means that not all arguments must necessarily be reconstructed as deductively valid. This is especially relevant in the matter of reconstructing unexpressed premises (van Eemeren et al 2001: 180).

For our purposes it means that we don't seek to fill in missing premises all the time, in all individual arguments (syllogisms) but only where necessary, e.g. in the argumentation consisting of the conclusion 1.1.2 and the premises 1.1.2.1 – IA1.1.2.3. Implied Assertion IA1.1.2.3 is an unexpressed premise that goes together with the explicit premise 1.1.2.3 constituting a single argumentative support for 1.1.2.1. The weakness argument is central to President Putin's reasoning. In IA1.1.2.3 and especially in the explicit statement *And the weak get beaten* the speaker emphasizes the necessity of strong action in dealing with Chechen separatists who resort to terrorist attacks on Russian troops and civilians (e.g. in IC3). According to our reconstruction the statement *And the weak get beaten* lies at the very foundation of a long chain of arguments (1.1.3.1).

"Second, informal logicians view arguments as elements of ordinary, contextually embedded language use, directed by one language user to another in an attempt to convince him of the plausibility (not necessarily the truth) of the conclusion. For reconstruction, this implies taking into account the situated character of the discourse to be reconstructed" (van Eemeren et al 2001: 180).

This aspect is especially important for reconstructing ICs. In doing that we have taken into account not only the immediate context, i.e. the message as it has been spoken, but also a broader context of public debate over Putin's policy in Chechnya, and therefore, the need for the speaker to present some kind of *apologia*. The President's earlier statements concerning terrorism and the conflict in Chechnya (which lies outside the scope of this paper) have informed the above formulations of the ICs.

Let us now return to the pragmatic aspect of our analysis. According to the theory of argumentation there are three types of propositions or statements: propositions of fact, value and policy. "These correspond to the most common sources of controversy:

1. disputes over what happened, what is happening, or what will happen;
2. disputes asserting something to be good or bad, right or wrong, effective or ineffective; and
3. disputes over what should or should not be done" (Rybacki, Rybacki 1191: 27-28).

In pragmatic terms propositions of fact and value fall into the same category of utterances performed by way of assertive speech acts and propositions of policy correspond to the category of utterances performed by way of directive speech acts. The argument structure represented above contains exclusively statements of fact and value, of which the latter are only IC1 and IC2. Meanwhile the message contains utterances performed by way directive and commissive speech acts.

Commissive speech acts express the speaker's intention to commit themselves to a certain course of action. Such acts include pledges, promises, agreements, disagreements etc. *A series of measures aimed at strengthening our country's unity will soon be prepared* (24) and *I want to stress that all of these measures will be implemented in full accordance with our country's Constitution* (26) are examples of commissives. *We must create a much more effective security system and we must demand from our law enforcement agencies action that corresponds to the level and scale of the new threats that have emerged* (20) and *I think it is necessary to create a new system of coordinating the forces and means responsible for exercising control over the situation in the North Caucasus* (25) are examples of directives. In effect, the above directives are indirect commissives through which President Putin informs the country of his

commitment to introduce new measures to strengthen Russia's security.

The pragmatic analysis shows that most speech acts performed in the discourse are assertive and expressive acts. The former include claims, assertions, and statements and the latter include expressions of sympathy and condolence. Directives and commissives serve an extremely important purpose of confidence building in the discourse. However seemingly insignificant and secondary among the components of the arguer's communicative strategy they are still a valuable part of it. With the help of all types of speech acts the speaker achieves his objectives: to explain the reasons of the Beslan tragedy, lift the spirits of the people, vindicate his policy in Chechnya and in the Beslan crisis, and justify the proposed reforms in Russia's governance. To quote President Putin, "And terrorism, of course, is just an instrument to achieve these aims."

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ISSA Proceedings 2006 ~ Changing Our Minds: On The Value Of Analogies For Extending Similitude



Analogies are important in invention and argumentation fundamentally because they facilitate the development and extension of thought. (Chaim Perelman and Lucie Olbrechts-Tyteca, *The New Rhetoric*)[i]

In a recent article, A. Juthe notes that “it is not obvious that the most plausible interpretation [of an “argument by conclusive analogy”] is a deductive argument”; reconstructing those arguments as deductive, Juthe suggests, reveals “the perhaps too great influence of the deductive perspective in philosophy” (2005: 23). Juthe goes on to argue that “argument by analogy is a type of argument in its own right and not reducible to any other type” (16). In this paper, I extend Juthe’s analysis of analogical arguments in the interest of supporting an expansion of the category of argumentation in the public sphere beyond the traditional conception that’s valorized in Habermas’s conception of “communicative action.”

Analogical arguments may be assessed as valid, Juthe argues, by virtue of “a correlation or an intuitive connection based on our experience and background knowledge” (15). This conception suggests that there’s a major shift in orientation that’s needed to appropriately assess the value of analogical argumentation. More precisely, there are three shifts in orientation: reversing the relative importance usually allotted to properties in contrast to relations as well as to substances in contrast to events, when constructing arguments, and reversing the relative importance usually allotted to “warrant” in contrast to “background” when using the Toulmin model for argument analysis. Analysis of discussion of topics in public sphere argumentation suggests that we often rely upon analogical reasoning to propose alternatives to views propounded by discourse partners. Thus, examples in that domain inform my sense of the importance of analogical

argumentation, background knowledge, temporality (events rather than substances) and relationality (correlations and counterparts, rather than identities) in mundane concept formation. It may be helpful to note that I am not concerned to reject the value of warranted arguments involving properties and substances. Rather, my interest is in valorizing analogical argument as worthy in its own right; as irreducible to other forms; and as a form of argument that bypasses what I suspect is a lurking remnant of that “perhaps too great influence of the deductive perspective in philosophy” that Juthe notices. That same influence, I suggest, may well be efficacious in what I argue elsewhere (Langsdorf 2000, 2002b) is a constrained conception of argumentation that limits, and even distorts, Habermas’s conception of “communicative action.”**[ii]**

This paper continues my previous work on the ontological aspect of articulation by focusing on analogical reasoning’s revelatory power in argumentation that seeks truth in Heidegger’s sense of “*aletheia*,” or “uncovering.” But that concept easily suggests a realist, in contrast to constitutive, basis for inquiry. Thus my initial task is to delineate the contrasts between realist and constitutive ontological starting points, in relation to dramatically different expectations as to what analogical arguments may accomplish. My further task concerns the implications that follow from acknowledging that these expectations are embedded in constitutive rather than realist ontologies; namely, we must assess their truth value by standards other than those more traditionally used in argumentation theory. In this paper I pursue only the initial task. The titles I use for the two orientations rely upon John Dewey’s identification of philosophy’s “proper task of liberating and clarifying meanings” as one for which “truth and falsity as such are irrelevant” (1925/1981, p. 307). Yet Dewey modifies that separation of “meanings” and “truth” by his recognition that “constituent truths,” in contrast to “ultimate truths,” rely on a “realm of meanings [that] is wider than that of true-and-false meanings.” My thesis, then, is that analogical reasoning’s value lies in uncovering alternate meanings by using the implicit “background knowledge” that’s intrinsic to any communicative situation. That knowledge includes “intuitive connections” that shape “wider” meanings – those meanings that propose “constituent truths” – and so “facilitate the development and extension of thought.” For that process of developing alternative possibilities and extending conventionally accepted meanings, I suspect, is crucial for that little-understood process we call changing our minds.

I would summarize the contrasts involved in analogical, in contrast to more traditional, argumentation in these terms:[iii]

traditional argumentation	analogical argumentation
focus	
substances	events
static universals	temporal particulars
sameness	relations
confirming hierarchies of concepts	creative formation of concepts
warrant-reliant	background-reliant
reality as given	reality as constituted
goal	
clarity	complexity
limiting options (what is)	expanding options (what might be)
achieve agreement/consensus	induce consideration/deliberation
aim: truth (as correspondence)	aim: truth (as <i>aletheia</i>)
inductive strength/deductive certainty	possibility, plausibility, probability
action in accord with justified true belief	action motivated by identification or adherence
"ultimate truths" (Dewey)	"constituent truths" (Dewey)

There may well be an historical shift in interest in, and even preference for, each of these two modes of argumentation. Ronald Schleifer finds that "some time around the turn of the 20th century a new mode of comprehension arose," which supplemented those "received Enlightenment ideas concerning the nature of understanding and explanation" as culminating in Cartesian ideals of "'clear and distinct ideas' and the large assumption, central to Enlightenment science from Newton to Einstein, that the criteria for scientific explanation entailed . . . accuracy, simplicity, and generality" and which understood "reduction and hierarchy to be the 'methods' of science and wisdom" (2000, p. 1). The "analogical thinking" that "supplemented without replacing the reductive hierarchies of Enlightenment explanation," Schleifer continues, relies upon "metonymic series rather than synechdochial hierarchies"; more specifically, it encourages thinking in concrete and particular terms, rather than abstract and universal terms – and thus, valorizes an orientation toward the particular and transient, rather than the universal and stable; toward complexity and plurality, rather than simplicity and univocity (pp. 8-9). "Analogical knowledge," Schleifer reminds us, "is irreducibly complex. It traffics in similarity and difference that cannot be reduced to one another," and so "suspends the law of excluded middle" (pp. 14-15). It "embodies the serial work of the negative" in proposing relations, similarities, and differences that may be discerned in "momentary or emergent insights" (p. 24).

The conceptions of knowledge, logic, and argumentation predominant in each of these modes of comprehension rely upon remarkably diverse ontological

assumptions. Traditional argumentation correlates well with Schleifer's characterization of "Enlightenment ideas . . . of understanding and explanation," which rest upon an assumption that reality – including human beings – is given to inquiry, although physically as well as psychologically malleable. Traditional argumentation thus seeks clarity and consensus in regard to propositions that assert generalizable points of correspondence between claims and reality; between what we know and what is the case for what is, independent of the human interaction with reality that's a necessary condition for any particular process of inquiry. Jürgen Habermas adopts this mode of argument in his delineation of communicative action as a process of representation and transmission. What's implied here is the presence of a given – whether objects, events, or sense-data – that is identified in language. Communicative action's task, then, is accurate representation of that given, in language that can be used in deductive or inductive reasoning toward an epistemic goal. This is so whether that goal is sought through speakers' communicative action engaged in cognitive efforts toward accurate knowledge of the natural world, or interactive efforts toward correct interpersonal establishment of our social world, or expressive efforts toward truthful disclosure of their subjectivity.**[iv]**

Without requiring rejection of that conception of knowing and being, analogical thinking – particularly as carried out in analogical argumentation that marshals premises in support of a conclusion – seeks to comprehend the complexity of matters. Within this alternate mode of comprehension, inquiry is oriented toward uncovering *how* matters might be, rather than positing propositions that correspond to *what* things are. A multiplicity of meanings emerge in the interaction between (in Kenneth Burke's terms) "beings that by nature respond to symbols" (1962, p. 567) and the elements that engage those beings' attention. For those beings – we who essentially and extensively engage in communicative action – evoke an apparently inexhaustible wealth of perspectives on, and ways of assigning meaning to, elements that engage our attention. In so doing, we constitute a multiplicity of ways that matters could present themselves to us and ways that we, and they, could be related. Comprehending human being as using our symbolic capacities in constitutive, rather than representational, ways enables us to recognize the goal of analogical argument as inducing cooperation among distinctly diverse beings who devise ways of signifying what engages their particular attention, from within their particular perspectives and in relation to their particular goals. The meanings that emerge from the interaction between

symbolically active beings and their environments range in plausibility from possibility to probability, and each of us seeks to induce others' consideration of, and even, identification with, those meanings that win our adherence – even, transiently.

Karlyn Kohrs Campbell, in what may be the earliest explicit consideration of distinct ontological assumptions underlying rhetorical theory, emphasizes that a focus, such as Burke's, on human beings' symbolic abilities encourages investigation of "the rhetorical dimension present in all language use" (1970, p. 105) rather than delineating discourse that articulates a perspective as worthy of consideration as either "logical argumentation" or "rhetorical persuasion." Contrary to ontological assumptions that understand human being as primarily rational or volitional, cognitive or affective – and so, inspire rationalistic or behavioristic theories of human being – she proposes understanding human being as intrinsically symbolic. She grants that doing so sacrifices the "neatness and order" offered by the "analytical and empirical perspectives" adopted by (formal) logic and (physical) science. What's gained, I would add, is appreciation of the argumentative dimension of communicative action as informed by analogical as well as propositional characterizations. Further, what's enabled is recognition, in Thomas Farrell's words, that "every major institutional practice associated with a vital public sphere . . . seems to embody the creative strain of reason which we call rhetorical art" (1993, p. 237). That "creative strain of reason" seems to me to be especially exercised when we devise analogies to argue for how things both are and are not related to other things.

We can now look more closely at some examples that illustrate how analogies work to develop and expand thought. Analogies, in contrast to propositions, persistently signify both what is and what is not; or, what may be and what may not be the case. Assessing the value of a particular analogy requires us to look beyond the concepts that it joins via tentative and transient relation in a particular situation. But this looking "beyond" the particular situation in which the analogy is proposed involves looking into the background and goals that may be operative in proposing that analogy, while refraining from positing causal efficacy between background and analogical relation, or between analogical relation and goals – and also, refraining from positing general (even, universal) hierarchical structures.

Our first example is provided in the film, entitled *Capote*, that focuses on Truman

Capote's book, *In Cold Blood*, in the context of documenting his life. Gerald Clarke, author of the biography that provided the basis for the film, asked Capote about his feelings for Perry Smith – one of the two men executed for the murder that is the central event in Capote's book. In the film, the actor who plays Capote, Philip Seymour Hoffman, replies by suggesting both similarity and difference: "It's almost like we grew up in the same house, and I went out the front door and he went out the back." I reconstruct the analogy implicated in this response in order to direct our attention to the background knowledge – which may well be culturally specific – that supplies its force:

(1) Socially acceptable character : socially unacceptable character : : front door : back door	
(e.g., author)	(e.g., murderer)

Empathy (an expressive attitude; Habermas's third category) is articulated here not by approximating measurement of a property (such as "I felt a strong sense of empathy with Smith") but by identifying a process (leaving the shared house by doors that connote positive and negative relation with the inhabitants) that reaches into another domain for explanatory efficacy. The terms that are used evoke our understanding, which may be quite vague, of growing up within the same household (i.e., environment), but leaving that physical and social commonality in either a positive (author) or negative (murderer) way. Thus the response sketches a connection, rather than describing a propositional state of affairs, and so may invite reflection on the relation between upbringing and character development.

A second example relies on patterns of personality development within social interaction (Habermas's second category) to imply something about the nature of an entity (Habermas's first category). The source is an editorial in *The New York Times* on the topic of Vice-President Cheney's shooting accident, which wounded a fellow bird-hunter. The editorial writer articulates a less-than-complimentary assessment of Mr. Chaney with these words: "The vice president appears to have behaved like a teenager who thinks that if he keeps quiet about the wreck, no one will notice that the family car is missing its right door" (2005, February 14). I would reconstruct the analogy here so as focus on one element in background knowledge that's highlighted – and which may generate greater trans-cultural efficacy than the first example:

(2) Vice President : immature person : : keep quiet about a misdeed : no one will notice it

The analogical relation here is provided by only one element in the target – Mr. Cheney’s behavior in this incident, but not his size, or age, or particular office – in relation an element in the source – practices in which we ourselves, or others in our experience, may have engaged. Such first-person or hearsay evidence provides supporting, although uncertain, evidence: Sometimes, although not certainly, what remains unspoken remains unnoticed. Here also, understanding comes by way of sketching a process (remaining quiet about an accident) and relation (vice president or teenager to audience, whether immediate family or voting public) rather than through describing a propositional state of affairs, and so may invite reflection – in this case, on the possibility of recognizing other immature actions by this, or other, government figure.

A third example relies upon actions by animals that may well be less familiar than are the positive and negative associations of front and back doors, or the wishful behavior of immature persons. The source is a news article in *The New York Times* (February 14, 2006) that reports on the growth of online real estate transactions. In the context of responding to a reporter’s questions concerning the extent of change involved in real estate services provided online, rather than in face-to-face communication with a real estate salesperson, Glenn Kelman, chief executive of Redfin.com, a new online real estate agency, is quoted as recognizing “that change might be difficult . . . We are like the penguins on the edge of an iceberg when no one wants to jump in first. Redfin in going in first.” But, Mr. Kelman continued, “Maybe that isn’t such a good analogy. The first penguin in usually gets eaten by sharks or something.” I would reconstruct this analogy so as to focus on the speaker’s uncertainty about an element in the natural world (that is, an aspect of Habermas’s first category) that seems to instigate immediate reassessment and thus retraction:

(3) Redfin (online agency) : real estate industry : : first penguin into water : flock of penguins

The analogical relation here is one that’s immediately re-evaluated by the speaker, who shifts the relation involved from one of adventuresome or brave action to that of foolish and even self-destructive action, and so indicates unwillingness to adhere to, or continue to identify with, his own proposal for

relation based in similar action. Here again, one element – this time, an explicitly temporal one, being first into a situation – provides the basis of similarity. When that element is re-assessed negatively, the speaker rapidly retracts the analogy. A listener may, however, wish to retain the analogy in order to suggest that Mr. Kelman's firm is, so to speak, shooting itself in the foot by taking the lead in bringing about the demise of its own industry.

The last example is far more contentious. The source is a response from Ward Churchill, a professor at the University of Colorado, to criticism of his characterization of certain persons who died in the attack on the World Trade Center as "little Eichmanns" because of their jobs as "technocrats of empire" within the U.S. economy.**[v]** He compared their employment to Adolph Eichmann's job within the Nazi economy, which involved "ensuring the smooth running of the infrastructure that enabled the Nazi genocide." I reconstruct his argument in order to focus on what appears to be the crucial element, the process of "enabling":

(4) WTC "technicians" : Eichmann : : enabling U.S. aggression : enabling Nazi aggression

By extension, Churchill continues, "American citizens now" are analogous to "good Germans of the 1930s & '40s" in regard to a set of practices that constitute only one element of their being: U.S. citizens' "complicity" in accepting the consequences of government standards for "'justified . . . collateral damage'" (namely, "economic sanctions" leading to the death of civilians) which he proposes is analogous to German citizens' complicity in accepting the consequences of Nazi racial standards (namely, genocide).

The controversy provoked by Professor Churchill's analogies illustrates the intense complexity of language choice, and thus, of communicative action, in comparison to the relative simplicity of Habermas's fourth category, language. That is: in contrast to the validity claim of truthfulness in regard to disclosing one's subjectivity, or rightness in regard to establishing interpersonal relations, or truth in regard to representing nature, Habermas links language to a validity claim of "comprehensibility." Yet there is an intellectual and emotional space that separates comprehensible linguistic formulations such as propositions that can be assessed through traditional standards for argumentation, from communicated symbolic action that is evaluated by the standards of analogical argumentation.

The importance of that space is suggested by Churchill's reminder, in the response from which I take the particular terms I've quoted here, that his "analysis . . . presents questions that must be addressed in academic and public debate." That is, he is sketching a perspective that invites – even demands – reflection on the extent of similitude between the processes and events he evokes from our background knowledge in relation to certain current events, rather than proposing a description of any entity.

Earlier, I quoted Juthe's characterization of analogical argumentation as that which proposes "a correlation or an intuitive connection based on our experience and background knowledge" (2005, p. 15). The relatively acceptable analogy underlying Churchill's contentious claims relies upon background knowledge that is at least vaguely familiar to generations not far removed from an agricultural economy: chickens let out into the barnyard will return to their nests. Also, it evokes language familiar to adherents of major faith traditions in the U.S., who have some degree of adherence to the principle that the sins of the fathers are visited upon the children, or, that human beings reap what they sow. More abstractly stated, actors cannot expect to avoid the consequences of their actions. More contentiously than in the first three examples we've considered, Churchill's argument, by weaving analogies together, uncovers connections, relations, and correlations that may be as resistant to complete rejection as they are reminiscent of background knowledge to which we give implicit, and perhaps only partial, adherence.

In contrast to epistemic orientations that traditionally valorize clear and distinct ideas, articulated in propositional form and evaluated by means of traditional logic, analogical argumentation is ontologically efficacious. This is not to say that communicative action creates a natural, or social, or even individual state of affairs. It is to propose that analogical argumentation performs the constitutive function that Lloyd Bitzer identified with rhetoric's functioning as "a mode of altering reality, not by the direct application of energy to objects, but by the creation of a discourse which changes reality through the mediation of thought and action" (1968, p. 3). Or, to return to the quotation from Perelman and Olbrechts-Tyteca with which we began: analogical argumentation, and particularly the type of analogy that Juthe calls "incomplete" – which would include the four examples we've considered here, all of which rely on highlighting one element in the many that constitute any event – enables the "development

and extension of thought” by (in Juthe’s words) by foregrounding elements that “determine . . . only probably and not definitely,” and so evoke “only a correlation or an intuitive connection, based on our experience and background knowledge” (2005, pp. 14-15).

NOTES

i. The epigraph is from page 385.

ii. The particular impetus for these remarks on the nature and value of analogical argumentation, by way of reconsidering the ontological assumptions underlying diverse assessments of that value, comes from an event within the contemporary US-American educational context. The Scholastic Aptitude Test (SAT) is created and administered by a private corporation, The College Board, and used by most US colleges and universities (with diverse levels of reliance) for determining admission to their institutions. The 2005 edition of the SAT replaced the segment that measured analogical reasoning ability with an expanded segment the measures writing skills. I have argued elsewhere (Langsdorf 2005) that argumentation theorists and teachers ought to join their colleagues in composition in urging reconsideration of that change. In this paper, I focus on a question that’s implied by that proposal: just why is analogical argumentation valuable for communicative action? In other words, my focus here is on the value of analogical argumentation for the informal logic-in-use in mundane communication, in contrast to the formal logic that characterizes abstract conceptualization.

iii. By “traditional” I mean deductive and inductive – but also, for some theorists, abductive and conductive – argumentation that is particularly relevant to work in the formal and physical sciences (e.g., mathematics, logic, physics), in contrast to work in the human sciences and humanities (e.g. rhetoric, literary studies, cultural studies). The social sciences (e.g., anthropology, communication studies, sociology) encompass (with diverse predominance in particular times and places) orientations toward both categories. In articulating these contrasts, I rely upon Chaim Perelman’s analysis in *The New Rhetoric* and *The Realm of Rhetoric* as well as on Kenneth Burke’s *A Grammar of Motives* and *A Rhetoric of Motives*

iv. I refer here to the four-dimensional analysis of communicative action delineated in Habermas (1984: 238) for discussion, see Langsdorf (2000b). Here is Habermas’s diagram (slightly modified) of the ontological dimensions or domains in which communicative action is operative:

Discourse of Ideology	Mode of Communication (Basic Attitudes)	Validity Claims	General Functions of Speech
"Thou" World of Internal Values	Cognitive Operative Attitude	Truth	Representation of Facts
"One" World of Justice	Normative Confirmative Attitude	Rightness	Establishment of Legitimate Interpersonal Relations
"Me" World of Internal Values	Expressive Expressive Attitude	Truthfulness	Disclosure of Speaker's Subjectivity
Language		Comprehensibility	

¹ The fullest development of Churchill's argument is in the widely circulated essay (Churchill, 2005) although the responses to it may well rely upon excerpts from that source or the number of articles and speeches he has given which repeat the contentious phrases.

v. The fullest development of Churchill's argument is in his widely circulated essay (Churchill, 2005) although the responses to it may well rely upon excerpts from that source or the number of articles and speeches he has given which repeat the contentious phrases.

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Interests And Difficulties In Understanding Chinese Culture: What To Prepare For When

Communicating With Cultural Others



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Abstract

Because of the long history and richness of civilization in China (Leung, 2008; Liu, 2009; Hu, Grove, and Zhuang, 2010), as well as the complexity and diversity of Chinese culture in mainland China and in the Chinese community worldwide (The Chinese Culture Connection, 1987; Fan, 2000), the task of designing an introductory course on Chinese culture for Westerners presents certain difficulties (Luk, 1991; Fan, 2000). While the content of a comprehensive course on Chinese culture remains to be decided, the present study explores a 12-week introductory course on four areas of Chinese culture. It was delivered to 16 Irish students who were doing a degree in Intercultural Studies. Each participant was asked to write a 500-word reflective journal entry every two weeks and an essay of 2,000-2,500 words at the end of the course.

The study aims to find out which area(s) and topic(s) might be of interest to or potential obstacles for Irish students in future participation in intercultural dialogue with Chinese people. Using the software Wordsmith Tools (Scott, 1996), the study identifies both the area and the sub-topic within each area that are of greatest interest yet previously unknown to Irish students.

The results show that the section on “love, sex, and marriage in China” was very well received and the most discussed topic in their journals and essays. The participants demonstrated fascination with the changing role of women in Chinese culture and identified shared ground in terms of marriage choices in both Irish and Chinese societies, which could help them to develop a deeper understanding of Chinese society and participate in intercultural dialogue from

this perspective. A number of topics, such as martial arts films, the urban/rural divide, loss of face, etc., can be employed as prisms through which students can explore and understand elements of Chinese culture and its evolution over time. The understanding of “face” in Chinese culture is perceived by the participants as being of great importance in intercultural and interpersonal communication, which could undoubtedly support engagement in open and respectful exchange or interaction between the Irish and Chinese. Interestingly, the participants indicated that it is difficult to understand that the use of linguistic politeness could lead to the speaker being perceived as “powerless” in Chinese society, which could mean that not being aware of this might lead to miscommunication between individuals with different cultural backgrounds. In general, the findings presented in this chapter may have significant pedagogical implications for teachers and students of intercultural communication, but may also be of interest to those with a practical involvement in intercultural dialogue. *Introduction*

Due to the complexity and diversity of Chinese culture in mainland China and in the Chinese community worldwide, in both the past and the present (The Chinese Culture Connection, 1987; Fan, 2000; Leung, 2008), it could prove difficult to define and establish the content of a course to introduce Chinese culture (Luk, 1991). Indeed, the selection of course content is also subject to the aims of the course and the needs of the target students. In the current study, the course “*Introduction to Chinese Language and Culture*” was designed to introduce four aspects of Chinese culture to any student in an Irish higher education institute who has not previously learned about or been exposed to Chinese culture. This article will first explore the content of this 12-week introductory course. I will then analyse the reflective journals and essays written by the participants in order to identify which area(s) of and topic(s) on Chinese culture might be of interest to or present difficulties for Irish students. Using statistically significant words and excerpts from the participants’ writing, this article investigates Irish students’ understanding of cultural differences between Chinese and Western societies, and how this understanding might influence their participation in intercultural dialogue with Chinese people in the future.

Course Design

The 12-week course was divided into four sections according to these four themes: (1) love, sex and marriage in China, (2) Chinese core values in martial arts, (3) Chinese social hierarchy and development, and (4) Chinese “face” and linguistic politeness. The content of the course also focused on reflecting

traditional Chinese values, communist ideology, and Western influence on contemporary Chinese culture in the People's Republic of China (Brick, 1991, p. 6; Fan, 2000). Core values of Chinese culture which are related to the four themes were also introduced in the course, because these values are likely to have remained stable in the development of Chinese history and can also be assumed to be shared by Chinese people in mainland China and worldwide (The Chinese Culture Connection, 1987; Fan, 2000).

The first theme, "love, sex and marriage in China", consisted of an introduction to Confucianism and traditional Chinese values such as filial piety, benevolence, loyalty, and the observance of hierarchical relationships in the family (The Chinese Culture Connection, 1987; Fan, 2000). Several linguistic terms were also introduced to explore the key concepts in this area: *huīyīn* (marriage), *xiǎojiě* (miss), *qìzhì* (disposition), and *tóngzhì* (comerade). In the second theme, "Chinese core values in martial arts", a series of martial arts literature and films were selected in order to present cultural values (e.g. trustworthiness, humility, harmony with others, sense of righteousness/integrity) that are essential in Chinese society even nowadays.

It also introduced Chinese philosophical streams such as Buddhism and Taoism that are mentioned or embedded in Chinese martial arts. Chinese words such as *wǔxiá* (knight) and *jiānghú* (rivers and lakes) were also discussed in class in order to provide participants with an appreciation of the uniqueness of martial arts in Chinese culture. The third theme explored "Chinese social hierarchy and development", concentrating on the shift away from the traditional Chinese hierarchy based on Confucianism and the social changes that have occurred in contemporary China, with a focus on the impact of communist ideology since the establishment of the P. R. China in 1949 and the influence of Western culture since the introduction of the open-door policy in 1978 (Leung, 2003).

This section of the course also examined core values such as benevolence, hard-work, solidarity, and patriotism, as well as the hierarchical ordering of relationships by status and the observance of this order in work situations. Concepts such as *hùkǒu* (household registration), *dānwèi* (work unit), and *tiěfànwǎn* (iron rice bowl) were employed to illustrate the development and changes in Chinese society. The fourth section of the course looked at "Chinese 'face' and linguistic politeness" in the past and in present-day China. Indigenous Chinese concepts such as "face" (*miànzi*; Leung, 2008) and *guānxi* (connection)

were also investigated when examining the differences between Western and Chinese politeness.

Table 1. Breakdown of journal entries and essays according to four topics

Topic/Corpus	Number of Journals	Number of Essays	Total Number of Words
Corpus 1: Love, sex, and marriage in China	16	8	17,531
Corpus 2: Chinese core values in martial arts	16	2	13,271
Corpus 3: Chinese social hierarchy and development	16	3	15,978
Corpus 4: Chinese "face" and linguistic politeness	16	3	15,766
Total	64	16	62,546

Table 1. Breakdown of journal entries and essays according to four topics

Data Collection

The data used for the current study consists of 64 reflective journal entries and 16 essays drawn from the assignments for the course. This course aimed at providing students with a basic knowledge of Chinese culture in such a way as to facilitate intercultural communication when they have contact with Chinese people in the future. A total of 16 Irish undergraduate students participated in the course, of whom 4 were male and 12 were female. The journals were written over a period of 12 weeks, with an average of 4 journal entries per student. Each student was asked to write a 2,000–2,500 word essay focusing on one topic that was of particular interest to him/her. *Table 1* provides a breakdown of reflective journal entries and essays by topic.

The size of a corpus is a key factor in determining its representativeness (Atkins, Clear, and Osteler, 1992; Biber, 1993). Flowerdew (2004, p. 18) points out that a specialized corpus is indeed subject to both the needs and purposes of the research under investigation, as well as “pragmatic factors such as how easily the data can be obtained”, etc. Since the present study focuses on exploring Irish university students’ attitudes towards four aspects of Chinese culture, 64 reflective journal entries and 16 essays were collected and employed for the purposes of data analysis. The total number of words varies across the four topics, but on average ranged between 13,000 and 17,000 per topic. The four corpora consist of a total of 62,546 words, with an average length of 15,637 for each topic-specific corpus. All the journals and essays were saved in separate .txt files

by topic of Chinese culture. The KeyWords function of Wordsmith Tools (Scott, 1996) was then employed to find the word frequency counts for each of the four topics. Through a comparison of each corpus with a reference corpus, any words that were statistically significant in the corpus were identified in order to establish common concerns and general attitudes towards each aspect of Chinese culture.

Results and Discussion

This research sets out to find quantitative information regarding attitudes towards four aspects of Chinese culture through corpus linguistic analysis and content analysis. Therefore, the results will be presented by topic.

Love, sex, and marriage in China

The five words which appear at the top of the KeyWords list in this category: marriage, Chinese, wedding, women, China. This reflects both the focus of the topic and the students' interest on the role of Chinese women in marriage. The concordance tool (Concord) in WordSmith can be used to display these keywords in context. Concord shows that "marriage law" (N=25) came first in the list of most frequent clusters. Indeed, the Marriage Laws implemented in 1950 and 1980 have had a marked impact on Chinese society and have engendered a significant change in the role of Chinese women. This group of Irish students, which had a majority of females, showed genuine interest in this aspect of Chinese culture.

After the P. R. China was founded in 1949, the new government started to re-structure Chinese society and a series of marriage reforms, along with the enactment of the Marriage Law in 1950, were put in place in order to give equality to all Chinese citizens. These reforms aimed to, among other things, improve women's rights by making their social status equal to that of men (Ettner, 2002, p. 44). The law provided greater freedom, especially for women, in the choice of mate and in terms of seeking a divorce (Pimentel, 2000; Ettner, 2002, p. 44; Leung, 2003). It also officially marked the end of the feudal marriage system which had existed in Chinese society for thousands of years (Engel, 1984; Pimentel, 2000; Leung, 2003). The 1980 Marriage Law further abolished any elements carried on from the feudal marriage system, i.e. prohibiting "mercenary marriage and bigamy" (Engel, 1984, p. 956). It also further consolidated the freedom of marriage by specifying that the foundation of a marriage is mutual affection (Engel, 1984, p. 956; Xia and Zhou, 2003, p. 237). At the same time, and

for the first time in Chinese history, a no-fault divorce was allowed, i.e. “divorce should be granted with complete alienation of mutual affection” (Xia and Zhou, 2003, p. 237).

While the 1950 and 1980 Marriage Laws legislate for the equality of men and women to some extent, Chinese women have occupied an inferior social position within the male-dominated cultural hierarchy for thousands of years (Zhang, 2002, p. 79; Leung, 2003; Liu, 2004; Shi and Scharff, 2008). Therefore, there is still a long way to go in order to raise the status of women and achieve sexual equality in contemporary China, which can be reflected in attitudes towards fidelity and sex. According to a study conducted by Zha and Geng (1992, p. 13), most of the male and female respondents insisted that female fidelity is more important than male fidelity. Interestingly, more women than men said that they would tolerate their spouses having an extra-marital sexual relationship.

Participants in the current study also demonstrated their awareness regarding the role of women in Chinese culture: *“Personally I think the tolerance of Chinese women to infidelity is fear of be [sic] left destitute if their husband leaves [. . .]”* (Participant no.1) *“[. . .] women have been devalued in Chinese society [and this] can be traced back to Confucianism, which is still highly valued and deeply rooted in Chinese history.”* (Participant no. 7)

Even though a number of topics and some core values of Chinese culture were only briefly mentioned in class, the above comments show that the participants were able to see the connections between them. Furthermore, they even demonstrated an attempt to find the similarities between Chinese and Irish societies in terms of marriage choice: *“. . . in the 70s and 80s, attitudes were much more conservative in Ireland. The dating culture was already prevalent, but parental approval would have been extremely important around this time. So already I can see a big similarity between Ireland and China.”* (Participant no. 9)

Chinese core values in martial arts

The top five most frequently mentioned words in the participants’ writing are: martial, film(s), arts, Chinese, wushu. Although different representations of Chinese martial arts (e.g. a poem, historical records, fiction, etc.) were introduced in the course, the participants expressed particular interest in Chinese martial arts films, which seem to be what Chinese martial arts are most famous for. In spite of a long history of Chinese martial arts literature (Mok, 2001; Teo, 2009, p.

17), Western audiences tend to know martial arts through watching films, from the earlier movies starring Bruce Lee (word count N=24) and Jackie Chan (N=13) to the international success of “Crouching Tiger, Hidden Dragon” (N=30).

A variety of unique concepts are associated with Chinese martial arts, e.g. xia (xiá, knight), wushu (wǔshù, martial arts), and jianghu (jiānghú, as explained below), as well as a few core Chinese values, such as trustworthiness, humility, and sense of righteousness. It is inevitable that the meaning of “jianghu” (word count N=31) will be investigated when discussing Chinese martial arts. Jianghu, literally “rivers and lakes”, connotes a culturally specific imaginary world where martial arts are supposed to take place (Chan, 2001). It is extremely difficult, if not impossible, to find an equivalent word in English due to the term’s richness of connotation. Five participants explicitly mentioned the helpfulness of watching films in understanding martial arts-related concepts.

One participant stated: *“After watching the film my understanding of the concept of xia is much clearer [. . .] The other concept of jianghu can also be seen in the film. [...] [I]t can be confirmed that the film ‘Crouching Tiger, Hidden Dragon’ is indeed a wuxia film thus the concepts of xia and jianghu can be identified in the film.”* (Participant no. 15)

In general, films seem to be a useful and easily accessible way for Irish students to contextualize and visualize martial arts: *“I think that after watching this martial arts film [‘Crouching Tiger, Hidden Dragon’] and researching the principle teachings of Confucianism, I now have a better understanding of the role that Confucianist [sic] beliefs have in Chinese society.”* (Participant no. 8) *“Also, what struck me, being somebody that has very little understanding of martial arts, the six scenes of battle [in the film] and where martial arts is being illustrated appeared to be more like a well-choreographed, exciting dance sequence than fighting.”* (Participant no. 6) *“I watched a recently released film entitled ‘Shaolin’ which I rented from a dvd store due to it being so recently released[.] Together with my friend from class we were able to share views and opinions on our understanding of how and why martial arts are used within the film.”* (Participant no. 13)

The participants also identified a few topics that are relevant to and can be seen in martial arts cinema. For instance, Chinese philosophy (“Confucianism” word count N=22, “Buddhism” N=18, “Taoism” N=25) was discussed in some of the

participants' journals. Five participants examined how Chinese martial arts films depict gender differences, which connects with the first section of the course. The clear interest in Chinese cinema as a means to understand the culture suggests that film can be employed to impart a deeper understanding of a target culture (Bueno, 2009; Zhang, 2010). Foreign language films have previously been used in the classroom for the purposes of developing intercultural communication (King, 2002; Pegrum, Hartley, and Wechtler, 2005; Starkey, 2007; Pegrum, 2008). Despite the extensive use of cinema in the classroom to promote European languages and cultures (e.g. Garza, 1991; Secules, Herron, and Tomasello, 1992; Dupuy and Krashen, 1993; Chapple and Curtis, 2000; Pegrum, Hartley, and Wechtler, 2005; Zoreda, 2006), there is a scarcity of studies on using Chinese films to increase understanding of Chinese culture (Zhang, 2010). This is potentially an area that merits exploring for future research.

Chinese social hierarchy and development

Since both traditional and contemporary Chinese social hierarchies and development were introduced in the class, it is unsurprising to see the most frequent words in the participants' writing were: society, urban, rural, Chinese, danwei. The indigenous concept of danwei (dānwèi, work unit) obviously attracts the attention of Irish students. It is generally the space of the socialist work unit (Bray, 2005, p. 1), specifically referring to any state-owned or state-operated factories in urban areas, public institutions, government departments, and military units (Solinger, 1995; Wang and Chai, 2009). It is defined as "an enclosed, multifunctional, and self-sufficient entity" and believed to be "the most basic collective unit in the Chinese political and social order" (Dittmer and Lu, 1996; Lu, 1997, p. 21). In terms of political order, danwei can be used as a mechanism to carry out governmental policies through the cadre corps working in the units. From the perspective of social organization, it provides a quasi-permanent membership entitling its members a variety of welfare supports, including housing, food, transportation, health care, etc. (Dittmer and Lu, 1996; Lu, 1997; Sartor, 2007, p. 48; Wang and Chai, 2009). For this reason, danwei means much more than a working place in Chinese society. Instead, it is even considered as an extension of the family which offers employment and material support for the majority of urban residents (Bray, 2005, p. 50; Sartor, 2007, p. 48). Therefore, the participants point out that this is a relatively "secure" (word count N=18) system.

However, the workplace is also perceived as representing a comparably “controlled” (N=19) and closed environment. Indeed, Bray (2005, pp. 34-35) has suggested that walled compounds have been used to define social space, e.g. danwei, and that rather than the enclosure or exclusion, the focus should be on “the spaces created by the wall and the forms of spatial and social practice which are inscribed within these spaces”. Interestingly, one participant realized the unique importance of danwei in Chinese society: *“In conclusion it was fascinating to discover more about the [d]anwei. At the beginning, I did find it difficult to comprehend but having looked at some elements more closely I realise my initial perception was too rash and that a greater understanding was required to fully understand what it meant and how it impacts on society. It was very interesting for me to read some direct quotes to see just how content the workers seemed to be, but also to realise that America would try to recreate some aspects of the community spirits to which they attached a great value.”* (Participant no. 3) The above quotation indicates that danwei is indeed a difficult concept for Westerners to understand. As Bray (2005, p. 3) has pointed out, there is no such an equivalent translation of this word and, consequently, the Romanized form of the word has been adopted in academic works. Nevertheless, it is possible for Westerners to acquire a better, if not full, understanding of this concept assisted by appropriate reading.

The economic reforms that have been introduced since the 1980s have brought fundamental changes to both danwei (Dittmer and Lu, 1996; Lee, 1999; Hassard et al., 2006; Wang and Chai, 2009) and the urban/rural divide, changes that have been observed by the participants. Rural and urban areas became officially divided in the P. R. China due to the rigid hukou (hùkǒu, household registration, word count N=32) system. It is employed to control population movement by restricting all Chinese citizens to their birthplace for life (Bian, 2002; Sicular et al., 2007). There have been reforms of the hukou system which have concentrated on loosening the restriction of mobility while maintaining socio-political stability (Wang, 2004). The rapid development of the Chinese economy and the possibilities for labour mobility have led to a number of issues relating to migrant workers, and the participants demonstrated their awareness of these workers’ status in Chinese society, i.e. mingong (míngōng, peasant worker, word count N=48), who are usually people from rural areas that go to work in economically developed urban regions (Ngai, 2004; Chan and Ngai, 2009).

Chinese 'face' and linguistic politeness

Face, Chinese, loss, politeness, person: these were the five most frequent words in the KeyWords list for this corpus. The expression "loss of face" was ranked first in the list of frequent clusters in Concord (N=32), followed by "concept of face" (N=13). On the one hand, the result shows the participants' awareness of the importance of "face" in Chinese culture (Cardon and Scott, 2003; Dong and Lee, 2007). On the other hand, it also indicates the potential difficulties in understanding "face" when participants invest their writing time to exploring the concept (Haugh and Hinze, 2003).

The "complex" (N=18) meaning of face was pointed out in some journal entries: *"The concept of "[f]ace" or [m]ianzi is quite a complex concept to define and understand in terms of its meaning in Chinese society."* (Participant no. 16) *"The concept of face in China is very complex."* (Participant no. 10) Although all the participants were majoring in Intercultural Studies rather than Business Studies, their understanding of face and loss of face is often exemplified in a "business" (N=29) context. This result seems to indicate the participants' enthusiasm for applying the cultural information they acquire in the classroom. In fact, the high frequency of "person" in their writing reveals their tendency to provide examples to illustrate the concepts in context.

The participants were also interested in investigating the differences in the concept of face between the "West" (word count N=25) and China: *"The concept of losing and giving face is extremely important in Chinese culture and differs greatly to the ideas of [W]estern culture."* (Participant no. 14) *"The Chinese people are now aware of the way other business people from the [W]estern world operate, and because they deal with them often they are less likely to get loss [sic] face."* (Participant no. 15) *"...it is first necessary to define 'face' in Chinese culture, as definitions differ between Western and Chinese cultures."* (Participant no. 3) Some participants demonstrated their awareness of the association between linguistic politeness and "power" (N=18) in Chinese society.

Interestingly, it seems difficult for them to understand the employment of linguistic politeness as an outward sign of being "powerless" in Chinese society: *"I was really surprised to learn that in a social situation, the use of conventional polite terms would indicate inferiority. Especially when we learnt that in the context of a service encounter, such as in a shop, the customer should use polite language and the one working there should not, as they are in the position of*

power in the situation. This is the opposite of what happens in a service encounter in the Western world, where the motto 'The customer is always right' prevails, which means that the worker should do everything in their power to please the customer. Good manners are an essential part of this, proven by the fact that people would complain a lot if they were spoken to in an impolite manner in a shop or restaurant." (Participant no. 8) *"I found this topic [on power relations in terms of linguistic politeness] to be a very interesting one. It would no doubt be useful to know this if I ever go to China."* (Participant no. 2) The politeness theory proposed by Brown and Levinson (1987) indicates that power is one of the three factors that influence the choice of politeness strategies. Studies in Chinese contexts (Pan, 1995; Feng, Chang, and Holt, 2011) confirm that power is still a significant factor in determining politeness behaviours in Chinese communication. Indeed, China is a society with high awareness of hierarchy and power relations (The Chinese Culture Connection, 1987; Leung, 2008).

Traditionally, linguistic politeness, such as the self-denigrating and addressee-elevating language promoted in Confucianism, was usually employed by both the speaker and listener to show humility and mutual respect (Kadar, 2008; Pan and Kadar, 2011). Pan and Kadar (2011) explain that the traditional linguistic politeness has been lost due to a series of political changes in China since the end of the 19th century. The foreign invasion of China in the late 19th century brought with it advanced technology. It also raised doubts about traditional Chinese culture, including Confucianism, among Chinese intellectuals (Pan and Kadar, 2011, p. 1526). In addition, traditional polite expressions were further eliminated after the P. R. China was founded in 1949 and during the Cultural Revolution between 1966 and 1976 (ibid.). A large amount of linguistic politeness has been lost in the past few decades. In contemporary China, the employment of linguistic politeness is considered as signalling powerlessness in communication (Pan, 1995, 2000; Pan et al., 2006; Sun, 2008). This has been evidenced in the domain of customer service. A customer is usually a person who needs help from a service provider, which positions him/her as powerless in the social interaction and consequently polite expressions are used in order to receive the service. As exemplified in the statements above, it was shocking for the participants to find out the association between linguistic politeness and powerlessness in Chinese communication since it is significantly different from service encounter interactions in Western cultures (Merritt, 1976, 1984). Therefore, it is very likely that Irish students would experience cultural shock from this perspective in social

interaction with the Chinese.

Conclusion

Through the analyses of the writings of a group of Irish students who had not previously learned about or been exposed to Chinese language or culture, the study identifies both the area and the sub-topic within each area that are of greatest interest to them. Of the four sections that were focused on in the course, the section on “love, sex and marriage in China” was very well-received and the most discussed in their journals and essays. *“Throughout the course of this module, I have studied various aspects of Chinese culture. I have learned a lot from the classes and from the readings when completing the other reflective journals. I found the second lesson on ‘Love, Sexuality and Marriage in China’ [sic] the most interesting [. . .].”* (Participant no. 2) *“Throughout the course [. . .], I have discovered the different [m]arriage beliefs which are followed in China, and how they have changed over the years due to the Western influence one might say.”* (Participant no. 4) The current study found that the Irish participants were fascinated with the changing role of women in Chinese culture.

To some extent, they explored the existence of shared ground in marriage choices in both Irish and Chinese societies, which could help them to develop a deeper understanding of this particular topic and participate in intercultural dialogue from this perspective. Interestingly, it seems difficult for Irish students to understand the association of linguistic politeness with powerlessness in Chinese society, which might lead to miscommunication between individuals with different cultural backgrounds. Despite the complexity and diversity of Chinese culture, the two quotations below show that the group of Irish students found the course a helpful and enjoyable way to explore and understand elements of Chinese culture: *“I enjoyed [it] very much as it allowed me to understand a new way of living, a new idea, a new view of females in China, and Taiwan.*

It allowed me to learn something new and discover new things.” (Participant no. 1) *“I have now been studying ‘An Introduction to Chinese Culture and Language’. We have had some very interesting lectures, and class discussions.”* (Participant no. 9) The present study might be at the forefront of Chinese cultural education, and the pedagogical implications for teachers and students of intercultural communication are potentially significant. However, the fact that culture is not static could present a substantial obstacle to designing a course to introduce Chinese culture to Western learners.

China is currently experiencing hyper economic growth, with an average 9% increase in GDP every year since 1978 (Kuijs and Wang, 2006; Yuan and Liu 2009, p. 17). It is inevitable that a culture will continue to evolve and that people in this society will change their values and practices. In the current study, a number of core cultural values that have been researched and confirmed in Chinese society were introduced to the students.

In addition, a few indigenous concepts were employed in order to guide the Irish students through the historical changes in Chinese culture and society. The course also had to focus both on the mainland China and on Chinese culture as a whole. The dangers of over-generalization and ignorance of regional diversity are very real. It might be worthwhile for future research to explore pedagogical methods of teaching cultural differences within China and amongst Chinese communities worldwide.

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The History And Context Of Chinese~Western Intercultural Marriage In Modern And Contemporary China (From 1840 To The 21st Century)



Picture 1.8 The lovestruck Qian Xiuling and her Belgian Man, 1933

Source: <http://news.sina.com.cn>

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Appendix II

Abstract

Intimate relationships between two people from different cultures generate a degree of excitement and intrigue within the couple due to that very difference, however this also brings its own challenges. Intercultural marriage adds an extra set of dynamics to relationships. Although the Chinese culture is very different from Western culture, individuals from both nevertheless meet and fall in love with each other. The existence of intercultural marriages and intimacy between Chinese and Westerners is evident and expanding in societies throughout both China and the Western world. This thesis aims to present a true picture of Chinese-Western Intercultural Marriage (CWIM) with a focus on the Chinese perspective.

By employing a three-dimensional, multi-level theoretical framework based on an integration of theories of migration, sociology and gender and adopting a qualitative research paradigm, the main body of this study combines three theoretical approaches in order to explore CWIM fully using a panoramic view. The first part of the study is conducted from a macro-level perspective. It provides a historical review of intercultural marriage and transnational marital systems in Chinese history from the modern to the contemporary era through a discussion of the different characteristics of CWIM. The context and background of Chinese intercultural marriages in modern and contemporary China are also reviewed and analysed, such as the related regulations, laws, governmental roles, and so on.

The second section is conducted from a middle-level perspective. On the basis of the study's fieldwork, the demographic characteristics of the respondents are first

disclosed, and different patterns are identified as occurring in CWIM. The approaches to and motivations of CWIM are examined, and a framework of CWIM Push-Pull Forces and a model of Resource Exchanging Layers are established to explain how and why Chinese people have married Westerners. The exchanges and Push-Pull force components operating in Chinese-Western intercultural marriages are also discussed.

The third section offers a micro-level examination of the research, and it moves on to discuss the family relations in Chinese-Western intercultural marriage, particularly with the entrance of a member of a different culture into the Chinese familial matrix. This part of the study focuses on cultural conflicts, origins and coping strategies in Chinese-Western intercultural marriage with an emphasis on the experiences of Chinese spouses. Five areas of marital conflicts are revealed and each area is analysed from a cultural perspective. The positive functions of conflicts in CWIMs are then explored. The six coping strategies and their frequencies of usage by Chinese spouses are further examined.

The final chapter will summarise the points examined previously and will unravel the factors underlying CWIM by recapitulating the symbolic significance, social functions and gender hegemony represented in Chinese-Western intercultural marriage. In this way this study will provide more than an anecdotal description of Chinese-Western Intercultural marriage, but will present a profound analysis of the forces underpinning this cross-cultural phenomenon.

Key Words: Chinese-Western Intercultural marriage, History, Cultures, Motivation, Exchange, Marital Choice, Conflicts.

List of Abbreviations

CCP – Chinese Communist Party

CCW – Chinese Civil War

CH – Chinese Husband

CPC – Communist Party of China

CHWW – Chinese husbands & Western wives

CW – Chinese Wife

CWIM – Chinese-Western Intercultural Marriage

CWWH – Chinese wives & Western husbands

DIL – Daughter in Law

EU – European Union

FAO – Food and Agriculture Organization of the United Nations

FS – Foreign Spouses

IC – Intensity of Conflict

KMT – Kuomintang (Chinese Nationalist Party)

LS – Local spouses

MIL – Mother in Law

MM – Marital Migrants

PRC – People’s Republic of China

ROC – Republic of China

TP – Third Parties Records

USSR – Union of Soviet Socialist Republics

VC – Violence of Conflict

CWWH – Marriage of Chinese Wife and Western Husband

CHWW – Marriage of Chinese Husband and Western Wife

WPA – Western Physique Attraction

The History And Context Of Chinese-Western Intercultural Marriage In Modern And Contemporary China (From 1840 To The 21st Century)



Australian wife Margaret and her Chinese husband Quong Tart and their three eldest children, 1894.

Source: Tart McEvoy papers, Society of Australian Genealogists

1.1 Brief Introduction

It is now becoming more and more common to see Chinese-Western intercultural couples in China and other countries. In the era of the global village, intercultural marriage between different races and nationalities is frequent. It brings happiness, but also sorrow, as there are both understandings and misunderstandings, as well as conflicts and integrations. With the reform of China and the continuous development, and improvement of China's reputation internationally, many aspects of intercultural marriage have changed from ancient to contemporary times in China. Although marriage is a very private affair for the individuals who participate in it, it also reflects and connects with many complex factors such as economic development, culture differences, political backgrounds and transition of traditions, in both China and the Western world. As a result, an ordinary marriage between a Chinese person and a Westerner is actually an episode in a sociological grand narrative.

This paper reviews the history of Chinese-Western marriage in modern China from 1840 to 1949, and it reveals the history of the earliest Chinese marriages to Westerners at the beginning of China's opening up. More Chinese men married Western wives at first, while later unions between Chinese wives and Western husbands outnumbered these. Four types of CWIMs in modern China were studied. Both Western and Chinese governments' policies and attitudes towards Chinese-Western marriages in this period were also studied. After the establishment of the People's Republic of China, from 1949 to 1978, for reasons

of ideology, China was isolated from Western countries, but it still kept diplomatic relations with Socialist Countries, such as the Soviet Union and Eastern European countries. Consequently, more Chinese citizens married citizens of ex-Soviet and Eastern European Socialist Countries. Chinese people who married foreigners were usually either overseas students, or embassy and consulate or foreign trade staff. Since the economic reformation in the 1980s, China broke the blockade of Western countries, and also adjusted its own policies to open the country. Since then, international marriages have been increasing. Finally, this chapter discusses the economic, political and cultural contexts of intercultural marriage between Chinese and Westerners in the contemporary era.

1.2 Chinese-Western Intermarriage in Modern China: 1840-1949

In ancient China, there are three special forms of intercultural/interracial marriages. First, people living in a country subjected to war often married members of the winning side. For instance, in the Western Han Dynasty, Su Wu was detained by Xiongnu for nineteen years, and married and had children with the Xiongnu people. In the meantime, his friend Li Ling also married the daughter of Xiongnu's King[i]; In the Eastern Han Dynasty, Cai Wenji was captured by Xiongnu and married Zuo Xian Wang and they had two children.[ii] The second example is the He Qin (allied marriage) between royal families in need of certain political or diplomatic relationships. The (He Qin) allied marriage is very typical and representative within the Han and Tang Dynasties. The third example is the intercultural/interracial marriages between residents of border areas and those in big cities. As to the former two ways of intercultural/ interracial marriage in Chinese history, the first one happened much more in relation to the common people plundered by the victorious nation, while the second one was an outer form of political alliance. The direct reason for the political allied marriage was to eliminate foreign invasion and keep peace. In that case, when the second form went smoothly, the first form inevitably ceased, however, when the first form increased, the second form failed due to the war.

In modern China, intercultural marriages are very different from the ancient forms. The Industrial Revolution and developments in technology have accelerated people's lifestyles and broadened their visions. The industrial age broke through the restrictions on human living standards imposed by the Agricultural age, and it has given rise to a transformation in human social life, modes of thinking, behaviour patterns and many other aspects. All these changes

have had profound effects on means of human communication, association and contact. With the increase in productive powers of the community and the development of technologies, new systems and orders have been transformed and reconstructed in many aspects of the human world, such as in the fields of economy, trade, markets, politics, society, and even conventional social behaviour. New political systems were widely established in many countries in the world at the time. Theories of natural rights, the social contract and the people's sovereignty had been developing in Capitalist countries, thus free competition and free trade were the main themes of the modern era. The He Qin (allied marriages) in both ancient China and ancient Europe lost the basis of their existence. At the same time, frequent wars, increased trade, international business and more developed transportation systems had all been involving more and more countries and people, leading to people being able to associate with others with greater convenience and freedom than ever before. In comparison to previous times in history, great changes had also taken place in relation to international marriages in the world generally as well as in modern China.

1.2.1 Four Types of Chinese-Western Intermarriage in Modern China

Established by Manchu, the Qing Dynasty (1644-1912) reigned over the greatest territories of any of the Chinese Empires in history. It included numerous races, all related to Chinese civilisations from ancient times, and it made China a unitary multinational state with the largest territory for the first time[**iii**]. In terms of internal affairs, the Qing Dynasty regime was relatively enlightened and managed state affairs in a prudent way. Although ethnic discrimination and oppression did exist, intermarriage between different races was not restricted or interfered with. The only exception was the prohibition on marriage between Manchu and Han Chinese. For more than 300 years of the Qing Dynasty, intermarriage between different races, other than Han and Manchu, within China was very common. The royal family of the Qing dynasty maintained frequent He Qin marriages with the upper class of Mongolia, and they sent their princesses and aristocratic ladies to marry the Mongolian kings and dukes[**iv**]. For example, Qing Taizu had married his third daughter to Borjigin Suomuruoling and Qing Tai Zong married his eldest daughter, Gulun princess to Borjigin Bandi. In the meantime, the sons of the royal family of Qing had taken the daughters of Mongolian kings and dukes as empresses and imperial concubines[**v**].

Nevertheless, apart from intermarriage with people at border regions and

between adjacent neighbouring countries, intermarriage between Chinese and more distant westerners was rare before 1840. The reason was that the essential characteristics of foreign policy of the Qing Dynasty were concerned with closing China away from the outside world, and maintaining things as they were. In this way it refused such progress. The Qing Government closed the country in 1716 keeping only four trading ports, and a stricter code was implemented in 1757 leaving only one trading port, Guangzhou.**[vi]**

This was determined by the basic conditions governing social, political, economic and cultural status of that time. In the middle period of the Qing Dynasty, a policy of trade restriction was implemented; only one port in Guangzhou was retained for external trade on the sea, and Kyakhta was kept for external trade with foreign countries on land. Foreign merchants were only permitted to contact business organisations designated by the Qing government for trade matters. The Qing government also restricted the activities of foreign merchants and the quantity of import and export goods **[vii]**. In addition, before the middle 19th century, Europeans were not permitted to travel in China freely. By closing China from the outside world, imposing a policy of restricting trade and foreigners from entering the country China lost opportunities for external trade, and from the perspective of transnational marriage, it broke off economic and cultural communication between China and foreign countries and increased the distance between China and the rest of the world, which resulted in the limitation of Chinese people's foresight**[viii]**, and provided no opportunities for marriage with Westerners.

In the late Qing Dynasty (1840-1912), the Opium War opened the doors of China. China's defeat in the Opium War and the conclusion of the Treaty of Nanking had enormous consequences, as from then on China had lost its independence leading to significant changes within its society**[ix]**. The War was the birth of a Semi-Colonial and Semi-Feudal Society, and China was afterwards gradually reduced to a semicolonial and semi-feudal society. The word "Youli (Travel)" first appeared in the official documents of the Qing Dynasty after the Tianjin Treaty was signed between the Qing government and Britain in 1858. As regulated by Article 9 of this Treaty, British people were allowed to travel to and trade at various places inland with certain permits**[x]**. Particularly worthy of note was that, during the second Opium War, Britain, France and the USA all signed the Tianjin Treaty with the Qing government successively, but only Britain defined the concept of "Travel

(You Li)” of Westerners in the Treaty with the Qing government. In this way it can be observed that the Tianjin Treaty between Britain and the Qing government started European travel within inland China[xi]. Along with more and more Westerners coming into China, the policies of the Qing government became more open. A great many foreigners poured in leading to a gradual increase in intermarriage between Chinese and foreigners.

In December of 1850 the Taiping Rebellion, led by Hong Xiuquan, happened in China lasting from 1850 to 1864, when the Taiping Heavenly Kingdom was instated.[xii] The Taiping Rebels considered themselves Christian and believed in God and Jesus, therefore they considered Western countries their “brothers” and “friends”, and even fantasised that the Western powers could help them overthrow the Qing Government in the name of God[xiii]. With this diplomatic aim, Taiping Rebels had been seeking opportunities to associate with Western powers actively from the beginning. In 1853, Yang Xiuqing, Dong King of Taiping Heavenly Kingdom, said in his imperial mandated breve to British Envoy, Sir George Bonham: “You British people come to China from ten thousands miles away to pay allegiance to our Taiping Heavenly Kingdom, not only the officers and soldiers of our Celestial Empire will welcome you warmly, but also God and Jesus will also praise and reward your loyalty. Notice is hereby given that you British chieftain can bring your nationals to enter and leave China freely. You are free to come and go at your pleasure, and you can suit your own convenience to do your business and trade as usual whether you assist our heavenly soldiers to exterminate the evil enemies (Qing Government) or not. We ardently anticipate that the British can help and be dutiful to our Heavenly King together with us, to build up our establishment and great deeds in order to repay the great obligations of God.[xiv]”

Later, Western powers helped the Qing government to suppress the Taiping army, but the leaders of the Taiping Rebels still believed that “Westerners and we both believe in God, and our religion is the same, therefore they are not hypocritical and don’t have bad intentions. We hold the same religion, and our friendship with Westerners is as good as with family members.[xv]” Against this background, the areas of the Taiping Heavenly Kingdom were opened to Westerners, and many Westerners came to China leading to greater possibilities of Chinese-Western intermarriages. In addition, one of the most remarkable transformations in Taiping Rebel areas occurred in its gender policies and marriage system. Because

of the Christian belief that people are “all God’s children ”**[xvi]**, the Taiping Heavenly Kingdom operated a series of policies to achieve equality between men and women. Firstly, women were permitted to take the same exams as men to act as officials in government, and “women officials” were established in Taiping areas**[xvii]**. This surely changed the traditional role of Chinese women who had hitherto no political status and represented great progress in gender relations in feudal China. Secondly, the Taiping Heavenly Kingdom opposed and abolished women’s footbinding and living in widowhood**[xviii]**. Mercenary marriage and concubinage were also prohibited, and monogamy was advocated as normal practice**[xix]**. Marriages were required to be registered in civil departments, through which couples could acquire their marriage certificate. The earliest modern marriage certificate, the “He Hui” certificate appeared for its first time in modern Chinese history in Taiping areas**[xx]**. All of these policies and reforms that took place in Taiping areas paved the way for greater opportunities for foreigners to enter China, increased association between Chinese people and foreigners, and ultimately intercultural marriages.

The Second Opium War broke out in 1856 and lasted until 1860 when China was defeated again**[xxi]**. The Qing Government began to recognise its weaknesses and the strengths of Western countries, and consequently began to send Chinese students to study in the USA and Europe in 1871, during which many students married foreign wives. In the meantime, the Qing government began to establish diplomatic relations with more and more foreign countries, and some of the Chinese diplomats involved also married foreign wives in foreign countries. Since its initial opening, China has been compelled to open up further to the greater world. This has increased business and trade, foreign affairs, overseas study and even “Selling Piglets (labour output)”**[xxii]**, leading to transnational marriages becoming more common and the corresponding legal documents required being established successively. The earliest legal documents were Regulations upon Marriages between Chinese and German People in 1888, and Relevant Notes between China and Italy in 1889**[xxiii]**, which stated clearly that “Within the territory of China, if Chinese women are going to marry foreigners, the foreign men must report to local officials to obtain legal permission. And the Chinese women marrying foreigners should be supervised by their husbands**[xxiv]**. If the Chinese men are going to marry foreigners, the foreign women should also follow the example of being supervised by their husbands.”□If there was involvement in legal cases before or after marriage, and if the female suspect hoping to escape

the law by marrying into foreign countries was found out, they would be transferred to be judged by Chinese local officials[xxv]. Besides male superiority to females both in China and in Western countries, these treaties were basically equal.

In 1894, the first war between Meiji Japan and Qing China in modern times was fought. The cause of this war was that both China and Japan contested the control of Korea[xxvi]. Japan and China both increased political instability in Korea by intervening militarily. As the suzerain of Korea, China came at the invitation of the Korean king with the intention of retaining its traditional suzerian-tributary relationship, while Japan came bent on war with the intention of preventing the Russian annexation of the Korean Peninsula[xxvii], and more importantly, destroying the traditional Eastern Asian Tributary System[xxviii] which removed China from the centre and replaced it with the Japan-Centric East Asia International System, in order to achieve its further plan of invading China and expanding in Asia, which accorded with the Japan Meiji Government's consistent schema[xxix]. The war ended with the defeat of China's Qing in April of 1895. The war intensified the semifeudal and semicolonial nature of society in China, and the humiliating defeat of China sparked an unprecedented public outcry leading to the Wu Xu Reform movement in 1895 after the Qing Government signed the Treaty of Shimonoseki. A thousand or more candidates from all eighteen provinces including Taiwan who had assembled in Beijing for the Imperial Examination, captained by Kang Youwei[xxx], signed a strongly-worded petition opposing the ceding of Taiwan. This was called the "Gong Che Shang Shu" affair within Wu Xu period of reform (1895-1898)[xxxi].

The main aim of Wu Xu was to spark constitutional reform and modernisation, strengthen China and protect its people, and it was also very much concerned with women's and marriage issues because marriage and the family was the foundation of the Chinese feudal society which badly needed reform. The new regime firstly emancipated Chinese women to a great extent in modern China. New and anti-traditional marriage issues were widely discussed publicly in newspapers and periodicals in the Wu Xu reform period for the first time[xxxii]. Reformists introduced the "new images" of the Western woman in contrast to the "old" images of the Chinese woman, and they criticised and argued against the Chinese feudal code of ethics and customs that affected marriages in a comprehensive and profound way, such as Baoban Hunyin (arranged marriage),

Cong Yi Er Zhong (be faithful to one's husband to the very end), Nan Nv Da Fang (the chastity value) and Rigorous Preventions between Males and Females and concubinage. They also condemned the traditional gender order which caused Chinese women and young people to be physically and emotionally abused when they encountered marriage choices. Cases demonstrating the freedoms existing in marriage in Western countries and Japan were widely reported[xxxiii]. During the Wuxu Period, the member of famous reform group, Tang Caichang, published his revolutionary "Tong Zhong Shuo (Theories of Miscegenation)", in which they advocated intermarriage between Chinese and Westerners and the implementation of intermarriage to improve the Chinese race. This book presented a rare theory for China at the end of the 18th Century, and it was the first time in China that interracial and intercultural marriages were discussed against a wider context addressing such a momentous topic as the future of the Chinese nation. This could be seen as the first time that the Chinese systematically thought and studied interracial and intercultural marriages between Chinese and Westerners.

The Wu Xu movement produced a more acceptable condition for intercultural marriages at that time. Another contribution of Wu Xu reformists was the development of women's education, and it was an initial and important step for women's emancipation. Women's education was strongly promoted in this era; many women colleges were established, and women's legal right to have the same education as men was also gradually but effectively protected in the legislation of that time. The old feudal concepts discriminating against women, such as "Nvzi Wu Cai Bian Shi De (Innocence is the virtue for women)" and "San Cong Si De (the three obediences and the four virtues)" were gradually eroded, which paved the way for women's education[xxxiv]. (Although Ningbo Zhuduqiao Women College, the first women college in China, was established in 1844 by Miss M.Aldersey, and after that some other women colleges were established in China, they were all missionary schools founded by Westerners. Only since the WuXu period, has the women's college been properly established by the Chinese).[xxxv] More importantly, Chinese women also acquired the right to study abroad equal to Chinese men in the WuXu period. Chinese women's education abroad was a key process that led to Chinese women challenging their feudal families and traditional society, and it was an epoch-making event in modern China. It had an extraordinary meaning as it implied that Chinese women began to escape from the feudal family's dominion and to be free from the oppression of patriarchy,

with their subordinate position being changed gradually. Along with Chinese male students, Chinese women students began to pursue their loves freely and some of them married foreigners.

After the Xinhai Revolution in 1911, the Qing Dynasty was overthrown, and the Republic of China was established. Since then, the social vogue has been more open and enlightened. The old marriage system was shaken and gradually eroded and monogamy was widely advocated and accepted. Freedom in marriage, divorce and remarriage caused strong and deep repercussions in Chinese society[xxxvi]. “Independent marital choice” and “Freedom in choosing spouses” were the main themes of this period. The new ideas around marriage incited young men and women to resist the feudal code of ethics[xxxvii], what was more, living together in a sexual relationship when not legally married became fashionable after the Xinhai Revolution.[xxxviii]

The May 4th Movement in 1919 was the next landmark in modern Chinese history, and it also signalled a new epoch in Chinese women’s emancipation.[xxxix] It could be considered as the watershed between new and old in modern China. As a major issue relating to happiness and freedom of the individual, marriage and marriage culture attracted much attention once again in China at the time.[xl] The New Culture Movement along with the May 4th Movement created an upheaval in the old feudal order of human relationships, and brought the principle of liberation of the personality, and equal rights for Chinese people. Chinese disenchantment continually rebelled against the old forms of marriage. The momentum of marriage transformation in this period exceeded that in Wuxu period, Xinhai period and early years of the Republic of China, (ROC) and it formed the pinnacle of marriage reform in modern China.[xli] With the introduction of western cultures and philosophies into China, the concept of absolute marriage freedom became more deeply rooted among its people. “Singleness, marriage, divorce, remarriage, and cohabitation should be absolutely free.”[xlii] “Making match by parents’ order and on the matchmaker’s word” was discarded, divorce and remarriage rates increased, and the emphasis on the chastity value started to fade in this period.[xliii] The ideas of Feminism came to the fore. More people had further opportunities to go abroad, and the government of ROC did not restrict its people from going abroad and indeed sent more students, workers and business to foreign countries, in turn leading to more Chinese-Western intercultural marriages. In 1946, with the outbreak of the

Chinese Civil War (CCW), a surge in mobility of the population occurred again, and many Chinese refugees fled to Western countries opening another door for CWIM.

With the transformations brought about by the two Opium wars, the Taiping Rebels, the Wuxu Reform, the Xinhai Revolution and the May 4th Movement, CCW became more frequent in modern China, and Chinese society gradually entered a new stage. The feudal and traditional values and concepts of marriage and the family have undergone unprecedented changes, and the Western marriage system and concept have been accepted by more and more Chinese. This was an important transition and omen for the transformation from traditional to modern marriage.**[xliv]** This transition and transformation broke through the restraints of the Chinese feudal family, and played a vital role in promoting social culture, emancipating people from rigid formalism and increasing the number of intermarriages between Chinese and Westerners, which produced far-reaching effects on Chinese society.

There were three types of intercultural marriage between Chinese and foreigners in modern China. The first type was the most important one: overseas intercultural marriage between Chinese diplomatic envoys and Chinese students studying abroad. The second type was foreigners in China married to Chinese, including those intercultural marriages that happened in Zu Jie (foreign concessions), and the third type was of Chinese labourers who were sent to Western countries on a large scale from modern China. I will describe the three types one by one.

A. The first type of intercultural marriage between Chinese and foreigners in this period was the overseas marriage of Chinese diplomatic envoys and Chinese students who were studying abroad.

Between the Late Qing dynasty and the First World War, following several defeats in wars with Western countries, the Qing government tried to seek a way to save its regime, and sending students to study abroad formed a major component of its plan. Many Chinese students that went abroad to Europe and the USA married Western women. There is a long history of Chinese students studying in western countries, which can be dated back to as early as 1871. From the mid to late 19th century, especially from 1871 to 1875, the Qing government dispatched the first large scale group of Chinese students abroad to study in Western countries.**[xlv]** From 1872 to 1875, with the leadership of the “Westernisation group” including

Zeng Guofan, Li Hongzhang and Rong Hong,, the Qing Government had successively sent four groups of 120 children to study in America. Among them, more than 50 entered Harvard, Yale, Columbia, MIT and other renowned universities.[xlvi] In their memorials to the throne, Li Hongzhang and Zeng Guofan said that sending children to study in America is “an initiative deed in China which has never happened before”.[xlvii] As it had never happened before, the Qing government adopted a very serious attitude towards it. Its plan was to select brilliant children from different provinces, 30 a year and 120 in four years, and then to send them in different groups to study abroad. After 15 years, they would return to China. At that time, they would be about 30 so they would be in the prime of their lives and could serve the country well.[xlviii]



Picture 1.1 Chinese educational mission students Source: [http://www.360doc.com/Chinese educational mission students sent by Qing government before they went to America in Qing dynasty](http://www.360doc.com/Chinese_educational_mission_students_sent_by_Qing_government_before_they_went_to_America_in_Qing_dynasty).

Those students dispatched abroad were mostly male. When they reached western countries, as the first batch of Chinese to make contact with western land at that time, which entailed a totally different culture, society, set of customs and conceptualisation for male and female compared to China they experienced an unprecedented ideological shock. Chinese students abroad were attracted by the liveliness and romance of the Western female. One of the first Chinese students studying abroad to marry a Western wife was Yung Wing, who studied in the USA, and married an American woman, Miss Kellogg, of Hartford, who died in

1886.**[xlix]** Yung Wing probably was the first Chinese to go to study in the USA during the Qing dynasty, and he obtained a degree from Yale University. Yung Wing was born at Nanping, Xiangshan County (currently Zhuhai City) in 1828. In 1854, after Yung Wing graduated from Yale College, he came back to China with a dream that, through Western education, China might be regenerated, and become enlightened and powerful. From then on, he devoted his life to a series of reforms in China.



Picture 1.2 Mary Kellogg (1851-1886), wife of Dr. Yung Wing, at her wedding in 1875. Source: www.120chinesestudents.org

Another case was Kai Ho, who married a British woman. Kai Ho (1859-1914) was a Hong Kong Chinese barrister, physician and essayist in Colonial Hong Kong. He played a key role in the relationship between the Hong Kong Chinese community and the British colonial government. He is mostly remembered as one of the main supporters and teachers of student Sun Yat-sen. In 1887, he opened the Hong Kong College of Medicine for Chinese, which later became the basis from which the Hong Kong University was established in 1910. He married his British wife, Alice Walkden (1852-1884), in England in 1881 and returned to Hong Kong after his studies. Alice gave birth to a daughter, but died of typhoid fever in Hong Kong in 1884.**[li]** He later established Alice Ho Miu Ling Nethersole Hospital in her

memory.**[lii]**



Picture 1.3 Dr. Yung Wing

Source:

<http://hongkongsfirst.blogspot.com>



Picture 1.4 Alice Walkden: the English woman Ho Kai married in London in 1881

Source:

<http://hongkongsfirst.blogspot.com>



Sir Kai Ho



As well as Chinese-Western intercultural marriages of Chinese students who studied overseas, in the late Qing Dynasty, many diplomats of the Qing government married Western wives. With the increasing contact with Western countries, the Qing government began to establish diplomatic relations with more and more foreign countries, leading to marriages between Chinese diplomats and foreign wives in foreign countries. One case was that of Chen Jitong, who was from Houguan (today's Fuzhou), Fujian province. He studied at Fujian Chuanzheng Xuetang Fujian, (Ship-building and Navigation Academy) in his early years. In 1873, he became envoy to Europe for the first time, and two years later, took office in the France and Germany legation. He had been councillor of legation in Germany, France, Belgium and Denmark, and deputy envoy of legation in France, living in Paris and elsewhere in Europe for nearly 20 years.**[liii]** He was one of the first modern Chinese people to venture into the greater world. He was also the first appointed official of the Qing government to dare to bridge the gap between Chinese and foreigners and, in marrying a Westerner thereby attracting the disapproval of his countrymen, can be rated as another pioneer for intermarriage between Chinese and Westerners in modern China.

The Qing government lost the Sino-Japanese war in 1895. Like previous wars, this war intensified the semifeudal and semicolonial nature of society in China, and the humiliating defeat of China sparked an unprecedented public outcry leading to the Wu Xu Reform movement in 1895 after which the Qing Government signed the Treaty of Shimonoseki. Wu Xu reform concerned women and marriage issues very much because marriage and the family was the foundation of Chinese feudal society and needed to be transformed and reformed. With this new ethos, even the leader of Wu Xu reform, Kang Youwei, married two foreign wives, one

American Chinese named He Zhanli[**liv**], the other Japanese named Ichioka Tsuruko.[**lv**] In addition, women began to have the same rights as men in terms of studying in college and studying abroad. The government began to send female students to foreign countries. The first group of women students (of 20 women) was sent to Japan in 1905[**lvi**], and the first group of women students was sent to the USA in 1907. Since then, more Chinese women students were sent to Europe, the USA and Japan.[**lvii**] Independent and free marriage was the first pursuit of Chinese women students who studied abroad. Many women were pressing for the end of arranged marriages, and those who had an arranged marital engagement required their families to dissolve it, those who had not arranged engagements in China naturally began to choose their love partners freely. It was very common for Chinese women to love another man in foreign countries, and some of them married local foreign men and settled there.[**lviii**]

During the Wu Xu Period, the reform group Tang Caichang published “Tong Zhong Shuo (Theories of Miscegenation)”, in which he advocated intermarriage between Chinese and Westerners and the implementation of intermarriage to improve the Chinese race. In the tenth argument listed in his article, he particularly quoted the transnational marriage of Chen Jitong, mentioned above, as an example to indicate that intermarriage with foreigners was not only expected but also possible to be implemented. He said in his article, “Feng Yi and Chen Jitong both married Western women. Those Western at that time did not despise intermarriage with people from a weak country as China, how can you people give aggressive expressions and indignation to intermarriage?”[**lix**] From these words we can see his admiration for the non-typical phenomenon of Chinese marrying Western women. In Zeng Pu’s famous novel Nie Hai Hua, the author also gave emphasis to describing the duel for possession of Chen Jitong between his French wife and English mistress. At the time when scholar-bureaucrats in the late Qing Dynasty were mostly ignorant of the outside world, and regarded Westerners as Deviants, Chen was bold and reckless to marry a Western female; moreover, when Chinese people were subjected to every kind of discrimination by European and American countries, and Chinese men still had the “pigtail”, there were still Western women who disregarded racial prejudice and adored Chen. (Note: in the plot about Chen Jitong in Nie Hai Hua by Zeng Pu, he was named “Chen Jidong” in the book). Chen Jitong married a French lady Miss Lai Mayi who later played a major role in Chinese women’s education, Wu Xu reform, the establishment of the first public schools for girls and the Chinese women’s

newspaper[**lx**], and also had an English female doctor Shao Shuang who “admired his talent and followed him to China”, and gave birth to one son. This was similar to *The Life of Chen Jitong* (Chen Jitong Zhuan) by Shen Yuqing. In this book, it was also described that “he was skillful at shooting and riding horses. Where he was several meters from the horse, with one leap he can get on the horse; and when he used a gun to shoot a flying bird, he rarely missed it.”[**lxi**] The following photo shows Chen’s wife while she was staying with Empress Dowager CiXi.



Picture 1.6 Lai Mayi and Empress Dowager CiXi -
The left first is Chen’s wife

Like Chen Jitong, Yu Geng and his son, two diplomats, also took advantage of close connections. Yu Geng, whose wife was French, was generally known as a talent among the “Eight Banners”[**lxii**], and was an excellent tribute student during the Guangxu Period. First, he handed in a memorial to the throne against Ying Han, the governor of Guangdong and Guangxi provinces. He held the position of Shaoqing in Taipusi, and then was sent on a diplomatic mission to Japan and France. He had two sons and two daughters, the elder son Xinlin, the younger son Xunlin, the elder daughter Delin, and the second one Ronglin. They all lived in Europe for many years with their parents, received a Western education, and had a good mastery of English and French. Yu Ronglin even learned Ballet in France.[**lxiii**] According to his youngerst child, Yu Geng had four children with his French wife Louisa Pierson:

My father, Lord Ku Keng, made a widower by the death of his first wife, married Louise Pierson of Boston, who gave him four children, two sons and two daughters, of whom I am the youngest. Princess Der Ling, my eldest sister...[**lxiv**]



Picture 1.7 The left third is Yu Geng's French wife Louisa Pierson
Source: <http://www.ourjg.com/>

During the two opium wars, China had been sending students to study overseas. After the Sino-Japan War, China continued to send students to Western countries, and more to Japan. More Chinese students also married foreigners. At the transition between Qing and the Republic of China, especially after the loss of the Sino-Japanese War in 1894, China began to learn from Japan. Many young men went there including Yang Erhe, Wu Dingchang, Jiang Baili, Fang Zong'ao, Yin Rugeng, Guo Muoruo, Tian Han, Tao Jingsun, Su Buqing and Lu Xun whose two brothers both married Japanese women. In 1904, the Qing government constituted the "Concise Statute of Studying in Western Countries" **[lxv]**, and from then on, the number of Chinese students sent to Western countries increased. Chinese students who studied in western countries in the late Qing Dynasty had noticed the progressive development of Western women's rights "in western countries, women were the same as men, they started studying when they were young, they learned painting and calligraphy, mathematics and astronomy, star images and geography, maps, classics of mountains and oceans, and got the essence of knowledge, even men in China can not match those females". **[lxvi]** The New Record of Travelling around the Earth (Huanyou Diqu Xin Lu) was the first book to record what he experienced as a participator in World Exposition, The author Li Gui on his journeys through Western countries saw the development of Western women's rights for himself and expressed regret that women still could not study in the same as men in the China of the late Qing Dynasty, "According to western custom, female and male were of the same importance, the female can go to school the same as the male, so women can propose important suggestions and participate in important affairs" **[lxvii]**, Mr. Zhong Shuhe praised this comment as

a “declaration for equal women’s rights on a grand scale for the first time” in modern China.**[lxviii]**

After the Xinhai Revolution in 1911, the Republic of China was established but the Beiyang government kept the Qing’s policy of sending Chinese students to study in Western countries. With the funds of Boxer Indemnity Scholarship Program**[lxix]** many students obtained opportunities to go abroad. The number of self-supporting and self-funding students also increased markedly. According to records, from 1913 to 1914, 1024 students were sent to Japan and 205 students were sent to Europe. In 1916, the number of students studying abroad on government funds was 1397. In 1917, 1170 students were sent to America, among them 200 students obtained government funds, 600 students were self-funded, and 370 students relied on the funds of Boxer Indemnity Scholarship Program. More intercultural marriages occurred.**[lxx]** After the May 4th Movement in 1919, the program of Work-for-Study in France became popular. From 1916 to 1917, more than 1600 students went to France for the Work-for-Study program. Many of the most important torchbearers for the People’s Republic of China went to France in this period, such as Zhou Enlai, Deng Xiaoping, Wang Ruofei, Chen Yi, Wu Yuzhang, Li Lisan, Nie Rongzhen and Xiao San.**[lxxi]** Some of them married Western wives, for example Xiao San and Li Lisan.**[lxxii]** After World War I, France had lost a great number of men, so many Chinese students there could find a French wife easily, for example, He Siyuan and Zhang Daofan.**[lxxiii]**

In this period, the Chinese overseas knew more about Western society and gender orders. Evaluating the foreign female as the “Other” was common among Chinese males who studied abroad in the same period. For example, Lin Jinxian who toured to study in Western countries saw Western women were not as conservative as Chinese women, and he claimed that “western women were naturally with great affection”.**[lxxiv]** The gulf between new and old concepts first resulted in severe mental shock for the Chinese male. Mr. Qian Zhongshu, for instance, drew a subtle metaphor at the beginning of China’s opening:

“If doors and windows were widely open, it cannot say for sure that the old and weak inside the room will not catch a cold; if doors and windows were firmly closed, it was afraid that too many people inside the room may cause suffocation; if doors and windows were half open, maybe the effect will be like between refusal and consent in dating someone.” **[lxxv]**

Even relatively westernised Chinese like Hu Shi complimented the liveliness and

openness of the western female on the one hand, but on the other said that the “female in China was in a higher status than the female in Western countries”.[lxxvi] In addition, the European female was healthy, beautiful and with white skin, and the discipline between male and female was not so strict, so the first outside temptation for students studying abroad was Western feminine charm. “As far as I saw and heard, there were a lot of students indulged in sexual desire.”[lxxvii] Some Chinese male students also married Western wives. When Jiang Liangfu was staying abroad, he was imperceptibly influenced by what he saw and heard. He wrote in his book Travel in Europe (Ou Xing San Ji), that: *“Most of our students studying abroad were people younger than 24 or 25, some of them were college graduates of China, some even did not go to college, all their cultural insights such as knowledge and view points were shallow and their moral characters were not mature. Once they moved to European and American countries with orders, laws and full of temptations, everything was too impressive to keep their mind tranquil, in such unrestrained and far-ranging places, how can they control themselves?”* [lxxviii]

When they returned from abroad, students made reference to the Western countries, and initiated “Natural Feet Movement” and “Natural Breast Movement” for Chinese women.[lxxix] One famous scholar Hu Shi went to study in the USA, where he became acquainted with Miss Williams in America, and later wrote in his diary that “Since I have known my friend Miss Williams, I have greatly changed my opinion on females and social relations between males and females.”[lxxx] “The lady had such profound insight that no ordinary female could hold a candle to her. I knew many women, but only she had such a degree of thought and knowledge, courage and enthusiasm in one person.”[lxxxi] Zhang Zipin, who studied in Japan, also remarked that “I not only recognised the beauty of Japanese females at this age, but also was amazed by the development of female education and primary school education in Japan.”[lxxxii]

After the October Revolution, “learning from Russia” became popular, and Chinese students began to study in Russia. Jiang Jingguo, Li Lisan, Xiao San, Wang Bingnan and many others married Russian and German women. Some of these Western wives regarded China as their home since then, and obeyed Chinese notions of womanhood in their focus on assisting their husbands and teaching their children. At the fiftieth birthday of Jiang Fangliang, for example, her father-in-law Chiang Kai-shek gave her four Chinese characters, meaning

virtuousness and piousness, to encourage her.**[lxxxiii]** With the further development of women's education after the Wu Xu movement and the establishment of the Republic of China, more women went to study in Western countries in the 1920s and 1930s. For example, Qian Xiuling, who was fondly called by them "the Chinese mom of Belgium", was one famous example. Qian Xiuling went to study in Belgium in 1929, and she obtained her PhD degree in Chemistry from the University of Leuven. She had traveled to Belgium with her brother and her fiancé. She broke up the relationship with her Chinese fiancé after they had lived together for a while, and fell in love with a Belgian man and married him. The happiness of the couple is clear in Picture 4.8. Even at that time, Belgian people rarely saw intercultural lovers; so many passerbys stared at this couple:



Picture 1.8 The lovestruck Qian Xiuling and her Belgian Man, 1933

Source: <http://news.sina.com.cn/>



Picture 1.8 The lovestruck
Qian Xiuling and her
Belgian Man, 1933

Source:

<http://news.sina.com.cn/>

Historical records show that many famous Chinese men including scholars and scientists who had studied and worked in Western countries married Western women and, according to these, more Chinese men married Western women than the converse. Examples include Lu Zhengxiang[**lxxxiv**], Li Jinfa[**lxxxv**], Zhang Daofan[**lxxxvi**], He Siyuan[**lxxxvii**], Yan Yangchu[**lxxxviii**], Huie Kin[**lxxxix**], Liao Shangguo[**xc**], Yang Xianyi[**xc**i], Li Fengbai[**xc**ii] and Lin Fengmian[**xc**iii]. There are also some other famous Chinese male intellectuals who married Western wives, such as: Dr. Xu Zhongnian (1904-1981, French linguist, writer); Wang Linyi (Sculptor); Zhang Fengju (1895-1996), a great Translator and Professor in Peking University, and Chang Shuhong (1904-1994), Chinese painter; He was the director of Dunhuang Art Research Academy, and he devoted his whole life to the preservation of the artworks at Dunhuang.[**xc**iv] There were also many Chinese male scientists who married Western wives in this period, for example, Ye Zhupei[**xc**v], Xu Jinghua[**xc**vi], Qiu Fazu[**xc**vii], Bobby Kno-Seng Lim[**xc**viii], Huang Kun[**xc**ix], Du Chengrong[**c**], Tiam Hock Franking[**ci**] and Liu Fu-Chi[**c**ii].

B. Foreigners in China marrying Chinese, including intercultural marriages in Zu Jie (foreign concessions)

From an examination of available historical sources, there were only a few cases

of Westerners marrying Chinese in mainland China in modern times. The earliest formal interracial marriage between a local Chinese individual and a Westerner in modern China occurred in March 1862. An American Huaer (Frederick Townsend Ward) married Yang Zhangmei, daughter of Comprador Yang in Shanghai, who was very famous in the first year of the Tongzhi Period.**[ciii]** The second representative case of interracial marriage was between the American F. L. Hawks Pott, principal of Saint John's University and Huang Su'e. They married in 1888. Huang Su'e was the daughter of Huang Guangcai, a Chinese priest of the Church of England, who later became the chief principal of Shanghai St. Mary's Hall.**[civ]** The most famous interracial marriage in Shanghai was between the Jewish merchant Hardoon and Luo Jialin, in the Autumn of 1886. Luo Jialin herself was mixed race and was born in Jiumudi, Shanghai (between Street Luxiangyuan and Street Dajing). Her father Louis Luo was French while her mother, Shen, was from Minxian, Fujian Province.**[cv]** The third representative case was that of Cheng Xiuqi. In 1903, it was reported in the newspaper, Zhong Wai Daily, that a female missionary from Norway was doing missionary work round HuoZhou, Shanxi Province. She went on to marry Cheng Xiuqi, one of her believers, based on free courtship and changed her name to Yu Ying. Afterwards they went to Britain together and she gave birth to one daughter, before long they returned to China and set up Jie Yan Ju (Opium Rehabilitation Station) in Haizibian, Jin Cheng.**[cvi]** Shanxi province was always a closed and conservative area in China, but at that time it was even possible for Chinese-Western marriage to happen in such an area, there were also more intercultural marriages in other areas of China.

While there were only a few cases of this type of international marriages, intercultural marriages between local Chinese and Westerners in China was more common to see in Zu Jie (foreign concessions). These intercultural marriages were very representative, not only because Zu Jie had different laws from those generally applied in Chinese territories but also because its special and mixed cultures there. China was gradually becoming a semi-colonial and semi-feudal society in the 19th century, and many districts in cities including Shanghai were classed as leased territories of the western powers. In the modern leased territories where Chinese and foreigners lived together, there were some interracial marriages, a few of which were formal but many were informal (not registered but existed as de facto-marriages). In the following section, Shanghai will be taken as an example of international marriages between local Chinese and

Westerners in China as it was most famous for Zu Jie.

At present, the earliest thesis recording intermarriage between Chinese and foreigners in Shanghai settlements was Sino-American Miscegenation in Shanghai written by Herbert Day Lamson in 1936. This thesis utilised marriage registration files from 1897 to 1909 from the American consulate in Shanghai and studied intermarriage between Chinese and Americans at that time in Shanghai.**[cvii]** According to the population records of the consulate, during the three decades from 1879 to 1909, there were 34 cases of interracial marriages between American husbands and Asian wives, among whom were 8 Japanese women and the rest comprised 26 Chinese women. There was no case of a Western wife married to an Asian husband. Of the 26 cases in 1930, there was less than one case of intermarriage each year. The jobs of the 34 Americans marrying Asian women are listed as follows: 11 seamen, 2 policemen, 2 sailors, 3 customs officers, 1 engineer, 1 missionary and 14 with indeterminate jobs.**[cviii]** During the 8 years from 1910 to 1918, there were 202 marriages on the records of the US consulate in Shanghai, among which there were 18 Asian wives including 6 Japanese, 1 Philippine, and 11 Chinese. From 1920 to 1922, there were 217 cases of registered marriages, while from 1930 to 1932, there were 236 cases. In these 6 years, there were 453 cases in all, among which only one was an American white woman with an Asian man, a Philippine in that case. There were 10 cases with Chinese or Japanese women, the proportion of which went down in comparison to previous years. The reason might be that in these registered marriages the number of white women increased. During this period, the Russian population and the prevalence of Russian women increased rapidly in the French concession and the International Settlement. For these American white men, especially those with low incomes such as seamen, sailors and customs officers, Russian women were more popular than Chinese or Japanese women. Most of the Russians in Shanghai were of low economic status, which increased the possibility of marriage between Russian women and Western white men from the lower classes. These Russian women sang or danced in the night clubs, and to some extent interacted more with the white men than did Asian women, which also increased their chances of marriage with white men.**[cix]**

There were materials about 9 cases of interracial marriages in the Shanghai Archive relating to the English, among which 2 were between Chinese men and Western women (one couple got divorced less than a year after their marriage),

and the other 7 were all between Western men, mostly English, and Chinese or Korean women (one divorced).**[cx]** H. A. Martin, British Irish, married Ms. Tan of Guangdong who lived in Shanghai. The date of their marriage was not clear, but she gave birth to a son, Martin, in 1909, and lived at 214, Huashan Road. AnnaM. Meyer, a German, married Li Amei on the same day. In 1911 they had a daughter and lived in 20, Lane 148, Guba Road. Limbach, a German, married Ms. Gao in Qingdao. The date of their marriage was not clear, but they had a son in 1913. In 1915 they moved to Shanghai, and Limbach later became a professor of Tongji University. Isaiah Fansler was an American who was first a seaman stationed in China. He married Tang Yushu, a Chinese woman in 1939. Yao Runde, a Chinese man, married a Swiss woman in Switzerland. They married in 1944 and later they returned to Shanghai. In 1945, they divorced. Francisco Garcia, an Englishman, had a wife named Wang Aizhen, a native of Ningbo. The date of their marriage was not clear, and they lived on Route Lafayette. In 1946 they had a son and in 1947 they divorced. Charles A lverton Lamson, an American, married Li Quanxiang, a Korean woman. In 1946, they married in Shanghai, and lived on Daming Road. In 1947 they divorced. Rolf Smion, stateless, held an alien resident certificate and was a dentist. He married Song Aili from Haiyan, Zhejiang Province in 1947, and lived on Zhaofeng Road. Tan Boying, a Chinese man, married a German woman, H. Schenke, the date of their marriage was not certain. They had a son and a daughter, and lived on Yuyuan Road.**[cxi]**

Judging by the evidence of transnational marriages and cohabitation in the Shanghai concessions, at the end of the 19th century the phenomenon of more Chinese men marrying Western wives was being replaced by a phenomenon of more Chinese women marrying Western husbands. Among those foreigners in Shanghai, there were many single without families, who had a lot of opportunities for contact with Chinese women. This would inevitably result in many informal marital relations between Western white men and Chinese women. Not only in the early days of Shanghai but also in the Ningbo concessions, there had already been examples of Westerners in Shanghai, who had a children with their Chinese maids. For the English, it was very common to have a Chinese concubine. In 1857, Herder, a translator in Britain's Ningbo consulate then and later Inspector General, lived with a Ningbo woman, A Yao. They lived together for 8 years in all. In 1858 or 1859, 1862 and 1865 they had three children who were then sent to Britain by Herder. Of humble origins, A Yao was a respectable woman. Her union with Herder transpired through introduction by compradors or other others. Xun

He, a colleague of Herder, bought a Chinese girl as a concubine soon after he came to China. Another colleague of Herder in Britain's Ningbo consulate, Meadows also had a Chinese wife.**[cxii]**

According to Bruner, John King Fairbank, and Richard J. Smith, one of the necessary conditions of high-class life for Westerners in China was to have a Chinese woman. This kind of woman was actually a walking commodity, which could be bought or sold by any foreign merchants.**[cxiii]** "At that time, the price for a foreigner to have a Chinese concubine was about 40 silver dollars" according to Herder.**[cxiv]** Powell, an American who lived in Shanghai temporarily, described the situation of formal or informal interracial marriages in Shanghai as "Shanghai could be considered as a city of men". Nine out of ten foreigners in Shanghai were bachelors, and therefore many friendly relationships developed and resulted in numerous international marriages, which even the American Marine Corps quartered at Shanghai took part in. "Once I asked a chaplain of the Marine Corps whether these marriages were happy or not. He answered 'just like other marriages'. I became to wonder if his answer had a little irony in it."**[cxv]** For the foreigners in modern Shanghai, especially those single Western businessmen, it was very common to have informal marital relations with Chinese women. According to Bruner, foreign businessmen could easily buy Chinese women in China, and therefore many of them were registered single on the household registration form. These churchmen did not deal with commodities and had no comprador, and as a result they quickly brought their wives to China as well.**[cxvi]** But why are there so few materials documenting these events? The story of Herder's diary easily demonstrates the reason. Although the diary was published, Herder deleted all the contents about his cohabitation with A Yao in Ningbo while he reorganised his diary which was left with a large gap. Afterwards, Herder was reluctant to discuss this experience and he never admitted that he was the father of the three mixed-race children in public, despite the fact that he always looked after them financially and loved them very much.**[cxvii]**

In general, there were not many interracial marriages between the Chinese and the Western whites in modern Shanghai. According to Xiong, it was estimated that after being opened as a commercial port between 1843 and 1949, there were no more than 100 cases of formal marriage between the Chinese and Westerners in Shanghai over 106 years. Judging from the aspect of time, there was a

tendency towards a gradual increase from far to near. Maybe this was related to the increase in foreign settlers, or the increasing communication between different races.**[cxviii]** For a long time, English settlers in Shanghai resolutely were opposed to marriage with the Chinese. In 1908, the English envoy in China sent out a confidential document, harshly condemning marriages with the Chinese and threatening to expel the violators of this rule from the English circle forever.**[cxix]** According to research by English scholar Robert Bickers, before 1927, policemen in the English police station, Shanghai Municipal Council, were prohibited from marrying the Chinese. In 1927, the general inspector of the station stated that transnational marriages did not meet the interests of the police force.**[cxx]** In 1937, the president of the Hongkong and Shanghai Banking Corporation said that marriage between foreigners and local Chinese mixed race people was absolutely intolerable. If anyone did this they would be formally fired by John Swire & Sons Group and other big companies.**[cxxi]** The community of English residents in Shanghai had a harsher restriction upon English women as they believed it was treacherous for noble English women to marry humble Chinese men. One English man wrote in his letter to his sister that “if you dared to have an affair with Asian men in Shanghai, you would never stay here well.”**[cxxii]** In the middle of the 1930s, the Department of the Far East under the English Foreign Ministry tried its best to persuade those English women who had an intention to marry Chinese men not to do so. In the official book, it warned that marrying Chinese men may cause loss of British nationality, which meant that those British women who married Chinese men would no longer be protected by British law in China.**[cxxiii]** Compared with the upper-class British residents, the restrictions upon the lower classes on marriage were looser, and there were some instances of marriage between lower-class British and Chinese. In 1927, policeman Parker in Shanghai Municipal Council applied to marry a Chinese woman. After the committee’s examination, the woman’s parents were believed to have high status, and the marriage was permitted. However this policeman lost any prospect of future promotion. In 1934, relevant departments in Shanghai issued martial certificates to 6 Chinese women all of whom had British husbands.**[cxxiv]** Therefore, it could be noticed that before wider contact was opened up between the Chinese and Westerners, both sides sought to protect their long cultural traditions of which they were very proud. After the Opium Wars, despite the Chinese defeat on the battlefield, their deep sense of cultural superiority was not lost. Equally, Westerners from Britain, France, the USA and other countries living in Shanghai also claimed to be the superior races on a

cultural level. Compared to the British, the Americans had a more tolerant attitude towards marriages with the Chinese, but they also basically opposed it.[cxxv] Therefore, in general, both sides rejected marriage with each other.[cxxvi]

In respect of transnational marriages in the modern Shanghai concessions, if it is said that there was not a high rate of Western men marrying Chinese women aside from a small number of cases, then it was quite rare to see examples of Western women marrying Chinese men. This was because if an American woman married or just was engaged to a Chinese man, the general reaction of other Americans was to question why she wanted to marry a Chinese man, and ask whether she could not find a more appropriate husband in the USA, regardless of how well-educated the Chinese man was. Other Americans would claim it would be unfair for their children.[cxxvii] However, the situation was quite the opposite to that of transnational marriages among the Chinese in America. At that time in America, nearly all of the transnational marriages relating to the Chinese were exclusively between Chinese men and Western women. In 1876, there had already been 4 or 5 cases of Chinese men marrying American wives in San Francisco. In 1885, there were 10 families of Chinese husbands and American wives there. From 1908 to 1912, there were 10 marriages of white women marrying Chinese men in New York, without a single case of marriage between an American man and a Chinese woman.[cxxviii] Mr. Wu Jingchao who researched this issue asked, *"Has there been any American man marrying a Chinese wife? In the materials I have collected, there has never been such a case. Of course, we know there were many cases of foreign men marrying Chinese women, but all of these happened in China rather than America. Only several years before, a Chinese woman, being an actress in some Hollywood movie company, fell in love with an American man who never married her. Later he said to others that I could be friends with the Chinese woman. As for marrying her, it was impossible. Even if I would, my mother would definitely disapprove and my friends may also oppose."*[cxxix]

In Shanghai, intercultural marriages were between Western men and Chinese women, while in America such marriages were between Chinese men and Western women.[cxxx] Although the trends seemed diametric opposites, they reflected the same truth that if the migrants only took a tiny proportion in comparison with the natives it was men who first broke through interracial marriage restrictions. It mirrored the situation at the end of the Qing Dynasty

when it was mostly Chinese men, especially those who had experience of staying in Western countries, who married western wives.[cxxxix]

C. Chinese labour workers who were sent to Western countries on a large scale in modern China.

Besides overseas study, overseas trade dealing and working abroad also become important ways leading to Chinese marrying Westerners in their countries. “Open up the Northeast of China”, “Moving to the West”, and “Sailing to Southeast Asia” are three great migrations of population in Chinese modern history. In the past, from the cultural perspective, the Chinese nation was an agricultural one, whose primary characteristics were sticking to one’s land and living a peaceful family life.[cxxxix] Indeed, great courage was required before they decided to explore and strive in the new world. As the old saying goes, it is better to be a dog in peace than to be a man in turmoil. The Chinese nation emphasises harmony between men and nature and a peaceful life, therefore, the Chinese would generally not leave their hometown without special reasons, such as extreme life pressures or war.[cxxxix]

At the demise of the federal dynasties in Chinese history, the common people and the fallen nobles of the previous dynasties started to drift abroad to Southeast Asia to escape the conflict. Due to its geological closeness, Southeast Asia became the migration destination and shelter of Chinese migrants. The drifting population would come to Southeast Asia despite the long distance to strive to make a living, this period was called “Sailing to Southeast Asia” in Chinese history.[cxxxix] Besides the Southeast Asian countries that were comparatively close to china, the Chinese also moved to western countries for the sake of employment.[cxxxix] Apart from working as labourers, the Chinese also did business in Western countries.[cxxxix] Among them many achieved huge success in their businesses, surprising the white people in mainstream society who later looked at them with new eyes.[cxxxix] These Chinese stayed there because of their businesses, and some of them married local people.

In the 1840s and 1850s, a large amount of Chinese migrants began to travel to the American West to seek gold, where they also assisted in building railways. Chinese migrants first appeared in 1848 when they found gold in California prompting others to join the Gold Rush. The earliest Chinese migrants came from Guangdong province, and were peasants from different villages who sailed to “Gold Mountain” after borrowing money or selling themselves to human

traffickers as cheap labour. The “Gold Mountain” referred to California in America. According to historical records, in February, 1848, that is, two months after the discovery of gold mines in California, two Chinese men and a woman sailed across the Pacific Ocean from Canton to San Francisco in California in the ship, the American Eagle, becoming the earliest Chinese migrants to land and stay at “Gold Mountain”. Two years later, different groups of Chinese came successively, among whom most quickly went to the gold mine, Sutter’s Mill, to seek gold, and a few gathered in Dupont Street and Sacramento Street at that time in San Francisco. Later “China Town” gradually evolved from this. In 1865, the number of Chinese migrants amounted to 50,000, 90% of whom were young men. They then came to the “Gold Mountain” to build railways instead of seeking gold.**[cxxxviii]** Many Chinese men could not find Chinese wives in the USA at that time, so it prompted some of them to find local wives; many of them married African American women.**[cxxxix]**

A similar movement of Chinese labourers happened in Europe, albeit with some differences. In 1914, World War I had taken place, resulting in the deaths of tens of millions of European labourers. Consequently, during the War, a great number of Chinese labourers were sent to Europe to supplement the work force of these countries.**[cxl]** In respect of France some margin studies found that many Chinese male labourers married French women at that time. Dr. Xu Guoqi showed that many French women married Chinese labourers during the First World War.**[cxli]** During the War, 140,000 Chinese labourers came to Europe to help the Allied war effort, 96,000 of them were allocated to the British army, and 37,000 were depatched to France. Many French men had died at war, so the French women welcomed Chinese men, and more than 3,000 Chinese labourers married French women at that time.**[cxlii]** Although Chinese male labourers were maltreated and beaten, and were not allowed to leave the camp, they still “managed to escape at night, for one night... Also there were problems with French women”.**[cxliii]** “Some Chinese male labourers formed attachments with French women and oft times children were born. At a later date they returned to China with their French wives and children. The exact number is not known, but French sources quote about 30,000,**[cxliv]** which appears excessive.”**[cxlv]**

With regard to Russia, as early as the 1860s, it had speeded up developing its territories in the far east, and built cities, roads, ports, railways and communication lines, in the process recruiting many foreign labourers, of which

Chinese labours made up the greatest number.**[cxlvi]** From 1891 onwards, Russia recruited Chinese labourers to build the Siberian Railway.**[cxlvii]** Russia suffered great losses in the War, and lacked labourers as a result, so it continued its policy of recruiting Chinese labourers.**[cxlviii]** Between 1915 and 1916, Russia reached a high tide in recruiting Chinese labourers. In 1917, the October Revolution occurred in Russia, and Tsarist Russia was overthrown by the Bolsheviks. About 200,000 Bielorussians went into exile to China because of the threat of the Russian 1917 Revolution, and many Bielorussians settled down in China and even married Chinese.**[cxlix]** At that time, there were 230,000 Chinese labour workers in Russia, who participated in the revolution to “protect soviet” as Chinese labour troops. Many Chinese labour workers in Russia at the time married Russian women, and this became commonplace among Chinese labour workers.**[cl]**

Besides those working as labourers, the Chinese also did business in Western countries. For example, in America, in 1870, the Chinese prospered in business although Chinese vegetable venders still sold their goods on the San Francisco streets carrying a horizontal stick on their shoulders. The laundries in downtown areas were mainly occupied by Chinese laundrettes. Many Chinese began to work in industries of quantity production, mainly in the four industries of shoemaking, fur textile, tobacco, and clothes-making. Until 1870, the number of Chinese workers amounted to half of the total numbers working in the key four industries in this city. Their employers were mostly Chinese as well. Until the 1970s, there were about 5000 Chinese businessmen in San Francisco.**[cli]** Among them many achieved great success in their business, surprising the Westerners around them and changing their perception of them.**[clii]** In Australia, many Chinese men also came to settle there for business reasons (See picture 4.11). These Chinese stayed there because of their businesses, and some of them married local people.



Picture 1.10 Chinatown in America of
19th Century

Source: <http://www.boonlong.com/>



Picture 1.11 Australian wife
Margaret and her Chinese husband
Quong Tart and their three eldest
children, 1894

Source: Tart McEvoy papers, Society
of Australian Genealogists 6/16/4
[cliii]

D. Intercultural marriages and Migration caused by the Chinese Civil War

Civil wars create refugees who flee across international borders to safer havens.**[cliv]** The Chinese Civil War (CCW), from 1945 to 1949, was fought between the Chinese Communist Party (CCP) and the Chinese Nationalist Party (KMT). It was one of the bloodiest and most violent wars in the modern world, and 6 million soldiers and civilians were killed.**[clv]** The end of the CCW produced a large wave of refugees from China to Western countries, such as the USA. Of all the Chinese migrants that moved to foreign countries, the refugees created by the CCW were the greatest in number. It was a very intense and sudden event in modern Chinese history. These departing groups were quite different from the peasant labourers who had pioneered the initial Chinese migration to the USA. These refugees included members of the intelligentsia, the upper classes, and families of wealth. There were also a number of Chinese students studying in the USA who were afraid of returning to China because of the changes in the political system. Many of them were subsequently granted immigrant status.**[clvi]** These

sudden and numerous fleeing Chinese people became the protagonists of CWIM in this period. As stated by Fink, the most important functional factors imposed by civil wars are spreading refugees into other States, presenting ethnic, linguistic or religious confreres in the destination countries, and sharing ideologies or alliances between the participants and potential patrons.**[clvii]** By these means, these groups of Chinese people had opportunities to marry Americans, resulting in some CWIMs during this period.

1.2.2 Government Intervention in Both China and Western Countries

Although it emerged as a social entity during this period, marriage between Chinese and foreigners also encountered opposition from the outside world, both from Western and Chinese governments. Westerners held racial biases against the Chinese, and so they set up various obstacles inhibiting marriage between the two cultures. Where Chinese men married foreign women, western countries tended to object to and discriminate against them. This could be seen as a miniature playing out of the male-dominated world, that is, men tried to prevent women of their race from marrying outward. This section will look at governmental intervention and the role that governments played in the CWIM of both China and the West in modern times.

For Western countries, in the 19th century, the ideology and government policies of Great Britain and the USA took a repellent or, at least, inhibitory attitude towards interracial marriages in their own realms.**[clviii]** For example in the USA, from the middle and late period of the 19th century and the first two or three decades of the 20th century, there were about 11 states in the USA prohibiting marriages between Americans and Chinese, including Arizona, California, Missouri, Oregon, Texas, Utah and Virginia. For some of these States, especially those in the south, they were always hostile towards people of colour, whether black or yellow. For those States in the west, such as California, where there were many Chinese immigrants, there had been movements against Chinese labourers and they were hostile to the Chinese. As we can see from Figure 4.8, there were almost no Chinese women in Chinatown, San Francisco in the 19th century. The early Chinese arrivals in USA were primarily young males, but the abounding prejudice and discrimination at that time in the USA forced the majority into segregated Chinatowns where opportunities for contact with non-Chinese females were extremely limited. Californian miscegenation laws were implemented from 1850 and these prohibited marriage between Caucasians and

Asians, Filipinos, Indians, and Negroes. These laws were not overturned until 1948.**[clix]** Even in the 1930s, Chinatowns in the USA were still seen as a 'man's town' or a 'bachelors' society'.**[clx]** In 1878, the California State Council approved an amendment prohibiting the Chinese from marrying whites. In 1880, Californian Civil Law prescribed that marriage certificates were not allowed for whites with blacks, Mulattos or Mongolians. In 1882, the Chinese Exclusion Law prohibited marriage between Chinese and whites. This was first issued in California and later spread around the whole USA, becoming a national law. In 1922, the Cable Law restricted and prohibited marriage between Americans and Asian migrants, and it warned that they would lose their civil rights if they married Asians.**[clxi]** In addition, a female's citizenship was not linked to her husband's, and this was mainly in order to prevent Chinese women from immigrating to the USA by marrying Chinese men who were born in America. Because of these regulations amongst other factors, most of the Chinese American men in the USA at that time did not have a wife. According to the data of Los Angeles from 1924 to 1933, only 23.7% of Chinese men there had non-Chinese wives, and at that time the male-to-female ratio among Chinese Americans was 9:2, so most Chinese men did not have a wife.

The situation was similar for other Asian people in relation to marriage. The Japanese had followed the Chinese in coming to America, and, in the early days, they had a very low intermarriage ratio. According to the data of Los Angeles from 1924 to 1933, only 3% married Japanese men had non-Japanese wives. The Japanese in America also suffered under the discriminatory laws and from the social discrimination encouraged by them. In 1923, the organisation, "Native Daughters of the Golden West" warned white women that "these days, some Japanese men with a good family background are found to peek at our young women, and they want to marry them." The president of the California Control Society even thought that the Japanese intended to conquer the USA with intermarriages as a key component of their plan.**[clxii]** Because of this cultural background, the American white people in China at that time always held an objective attitude toward marriage with people of Asian colouring. Some English scholars once tried to discuss this question from a sociological respect. In 1982, some Japanese wrote to Spencer, the famous English scholar, and asked about his attitude towards interracial marriage. In his reply, Spencer talked about his opinions and mentioned that the US prohibited the entrance of Chinese. He approved of this on the basis that if the US allowed the Chinese to come and go at

their will, there would only be two options for them. One was that in the US there would be two separate classes, the white and the yellow, and they would not intermarry. The other was interracial marriage which would lead to many undesirable hybrids. In his view, no matter which way it would be, the result was not favourable.**[clxiii]** Spencer's attitude had great influence, and well into the 1920s and 1930s, many westerners were of this opinion.

Australia provided another example. Western colonists considered the Chinese as different from them and believed they would be unable to integrate into white society for cultural, biological, language and racial reasons. The Australian Colonial government also implemented policies to impose race boundaries between whites and Chinese.**[clxiv]** These policies were not only confined to the political sphere but were extended to interracial intimate relationships. As stated by McClintock, they "gave social sanction to the middle class fixation with boundary sanitation, in particular with the sanitation of sexual boundaries".**[clxv]** White women's bodies and sexuality were considered by policy makers as very threatening and destabilising to the established boundary order.**[clxvi]** As McClintock suggested, white women were seen as "the central transmitter of racial and hence cultural contagion", and so they must be blockaded from men from other races.**[clxvii]** The intimacy between white women and non-white men brought great anxieties for the colonial government. The anxieties and indignation could be seen at the very early stages of 1850. Early debates of the 1850s on Chinese migration to Australia were particularly concerned about the possibility of the 'destruction of the white race' through sexual relations between Chinese men and white women, although there were only one or two cases of marriages between Chinese men and white women in Australia at that time.**[clxviii]**

Western countries not only constrained Chinese-Western marriages in their own realms, but they also wantonly interfered with and obstructed Chinese-Western marriages in China, and they demonstrated their powers in attitudes on intercultural marriages. In 1899, an American priestess and doctor in Guangdong married a Chinese man, Lan Ziying, which unexpectedly caused a big stir. Two American people in Guangzhou wrote to the American Embassy to suggest a doctor check whether the woman was suffering from a psychiatric disorder. This is a clear example of racial prejudice. The American consul in Guangzhou did not interfere as "there has been no obstruction for a foreign woman to get married

with a Chinese.” (However, in some States of America, there were laws prohibiting marriage between whites and Chinese).**[clxix]** In 1911, some Western women eagerly asked the British consul in Chengdu to intervene in the marriage between a British women, Helen, and Hu Jizeng in Sichuan. They said that Hu already had a wife, and had committed bigamy within Western terms. The British consul negotiated with Wang Renwen, Sichuan Vice Governor, and asked him to punish Hu according to the law. Wang said that under Chinese law, having two wives was not a crime. Finally the British Embassy in China realised they could not prevent the marriage but warned Helen: “If you don’t have a divorce and return home, it will be regarded that you give up your British nationality”. However, using Chinese terms, she said, “I would like to be his concubine even till death”. Unexpectedly, the angry envoy replied, “Britain would never permit you to be a concubine. If you are a whore, you are not permitted to stay in China.**[clxx]**” , In judging the case, Ta Kung Pao commented:

*“The marriage between Hu-He and Hu is a case based on their personal love which is not related to the third party. Now the British envoy says it will get involved as a matter of international affairs and force them to have a divorce. He has insisted that women from a great power are reluctant to marry men from a poor country while women in poor countries can be wife, concubine or even nothing to men from a great power. How pathetic it is!”***[clxxi]**

Later, he also commented, “the law should take people’s feelings into account, and the law is formed by nature. It is well-known that the British culture is famous for kindness around the world and wins respect from all countries. Therefore, most of the British people should be clement, and the British envoy would never like to see all of the Hu families die because of his plan. Maybe he also had to interfere in this affair”.**[clxxii]** Although this was to whitewash the British envoy’s deeds, it also indicated the real power behind powerful language.

For the Chinese, the Qing government had no intention of interfering with transnational marriages at first, and they let them be. The earliest legal documents of regulations on marriage between Chinese and Germans in 1888, and Chinese and Italians in 1889 basically made them equal to previous forms of marriage, and the Qing government did not intend to interfere too much. Later on, as there were more cases of this kind of marriage, some problems did arise, and the Qing government had to pay attention to them. In 1908, Li Fang, magistrate in the Da Li Yuan (Supreme Court) of the Qing government, asked for a divorce with his English wife from Shuntianfuyin Yamen (the chief executive

who was in charge of Beijing's government affairs and security in the Qing Dynasty). It was the first case of divorce between a Chinese and a foreigner. Li Fang wrote his request in his written complaint to Shuntianyingfu:

*I am Li Fang, a magistrate of the Supreme Court. I asked my family servant Li Xing to apply to the higher authorities for consideration of my case on behalf of me. Humbly I am from Chang Le county of Guangdong province, and I have studied in the UK since I was young. I married my British wife Paierli in 1899, and I brought her back to China when I graduated in 1905. Now because she has failed in her obligations to the family as a wife and she is a dissolute woman, she has gone back to the UK on her own since 1908. She has not returned, and she even wrote a letter to tell me that she would not return to China. We indeed are willing to divorce. In order to provide adequate documents and grounds of justification, I attached the capital officers' imprinted letter as well as Paerli's letter in her own writing for your reference. Would you please check them and also request the Foreign Minister to consult with the British legation to proceed. I humbly beg you to approve it for my convenience.***[clxxiii]**

This was an unprecedented case in China, of a man offering the excuse that his wife did not adhere to wifeness. After the divorce, the reports in the Chinese papers were quite amusing and it was used as a warning to those wanting to marry Western women.**[clxxiv]** In March 1909, the Qing government enacted and issued the Nationality Law which followed a principle based upon the paternal line.**[clxxv]** As there was a growing tendency for transnational marriages to be especially admired and followed by the young overseas Chinese students, the fashion of marrying Westerners was gradually being formed in China.**[clxxvi]**

Confronting this situation, at the beginning of 1910, the Qing government held a discussion about interracial marriages between Chinese and foreigners. It considered that as the exchange between various countries became more and more frequent, theoretically speaking, interracial marriages between Chinese and foreigners should not be prohibited, but should be restricted. It prescribed that future marriages between Chinese and foreigners should first be reported to the government. If one was a diplomatic official or officer, one was not allowed to marry a foreigner without permission. In the same year, the Qing Government also acceded to a request of the Imperial Educational Ministry and declared that overseas students should not marry foreigners. There were several reasons for this. First, during their studies, overseas students should not be burdened by a

family in case it affected their studies. Second, economically speaking, foreign women were considered basically extravagant, while overseas students had only a limited amount of money, and would not have a good balance between study and life if they married foreigners. Third, if overseas students married foreign women, they would be less likely to return and contribute to China's progress despite achieving academic success, so this would not profit the Qing government.**[clxxvii]**

This situation happened again in the Republic of China (ROC) era. Because those who engaged in intercultural marriages were usually of the Chinese elite, especially students studying abroad, the educational officials in ROC became very worried that their money might be lost to another country because of intercultural marriage. The ROC government believed that once they became husbands or wives of foreigners, they would not serve China any more. In July 1918, towards the end of World War I, the Ministry of Education of the Republic of China issued an order to restrict marriages between overseas students and foreigners. However, as they were too far away to control, its effectiveness was doubted.**[clxxviii]**

4.2.3 Summary and Discussion of CWIMs in Modern China

In summary, historic changes occurred through the opening-up of China at the end of the 19th century. The opening-up was the result of the advances made by Western powers in terms of guns and boats, and it brought closer contacts between the Chinese and Westerners for the first time after thousands of years. From the perspective of and the two nations, various battles between the two sides were mostly temporarily ended with compromises and concessions by the Chinese. It could be said that the Chinese endured much abuse and hardship during these years. It was against this major background that the earliest transnational marriages between Chinese and Westerners took place. I would like to summarise the characteristics, elements and the significance of Chinese-Western intermarriages in modern China.

Approaches and Social Classes:

As discussed above in terms of historical records, there were four approaches for Chinese to marry Westerners in modern history. Simply speaking, these marriages happened between Chinese-in-China and Westerners-in-China, and between Chinese-in-West and Westerners-in-West. But in fact these approaches are themselves contained within the following categories: 1) Chinese students and

diplomats studying abroad marrying Westerners; 2) Foreigners marrying Chinese in foreign concessions in China; 3) Chinese labourers working in Western countries marrying local Westerners; 4) Chinese refugees fleeing to Western countries due to the Chinese Civil War. It was obvious to see that CWIM in modern China was the result of freer contacts between Chinese and Westerners, of which Chinese spouses usually met their Western spouses freely and naturally through their studying, working and daily lives. Compared with other approaches to meeting and selecting spouses including certain purposive and high-tech approaches in the contemporary world, free association with Westerners is the most obvious characteristic of CWIMs.

The features of social class were also tightly related to the approaches in CWIMs in modern times. Diplomats and students sent to foreign countries almost all had high social status. According to the Chinese Social Stratification model, **[clxxix]** these people usually belonged to Cadre and Quasi-Cadre, or were Capitalists. The majority of the students were government-paid, thus even if some students studying abroad might not come from a wealthy family, their status as 'students' or 'intelligentsia' divided them from the common people, as they were sponsored and cultivated as 'the pillars of China' by the Qing or ROC governments. Some other students were self-funded (especially in the ROC period) and they were from wealthy families. The reason why they had the opportunities to contact and marry Westerners largely depended on their social statuses. These Chinese were the elite in modern China, and they were the first group of people who formally associated with and studied the Western world, thus they had more chances and were more open and cosmopolitan than the majority of ordinary Chinese people in China. To some extent they were less constrained and more accepting of intercultural marriages, as they had more privileges in powers and ways of dealing with their marital affairs than ordinary Chinese people. Similarly, the fourth type of CWIM in modern China consisted of the Chinese refugees who had fled because of CCW. These people were almost all intelligentsia, upper class, and from wealthy families, because only they had the economic capability of travelling to avoid war. Their associations and marriages with Western countries and Westerners also represented the social class attributes in CWIMs. In other words, Chinese spouses from the first and fourth channels had the power to choose their CWIMs and migration destinations. The third group of Chinese spouses who married Westerners in foreign countries were almost all labour workers in modern China, and the majority of them were male. They belonged to the peasant working

classes. They left their homes to make a living in a remote Western country. Their choices in intercultural marriages with Westerners came about through free association with Westerners. Moreover, they left China, and they needed to have a wife and family to fulfill the basic physiological needs and more importantly, the need to continue their family ties that were significantly standardised in traditional Chinese culture. To some extent, they had no alternative but to choose intercultural marriage. The foreign concession's situation was quite special, as it was a kind of "a state within a state", and a large amount of Westerners came into Zu Jie and associated with the Chinese freely. The culture in Zu Jie was more international than other parts of China of that time, and it created a social mode for free contacts between Chinese and Westerners. In summary, no matter which type of CWIM one belonged to in modern China, the majority of CWIMs were formed on the basis of free association and free love. This approach is very different from the arranged marriage which was the dominant marriage mode of traditional Chinese society. In this sense, CWIMs in modern China initiated the mode of free love and the freedom to select one's own spouse. In addition, upper class Chinese obtained more choices and capabilities than lower class Chinese in marriage and choosing intercultural marriages.

Government Roles in CWIMs:

Both Chinese and Western governments, but especially Western governments, were unwilling to encourage their people to marry Westerners/Chinese. Both Chinese and Western countries revolted against intercultural intermarriage. The Chinese attitude was marked by trepidation towards Westerners, and Westerners tended towards being disdainful towards marriage between their people and the Chinese. The CWIMs were strongly influenced and even interfered with by governmental power. Indeed, even the inertia of a negative attitude from both governments could still affect the people's choice in intercultural marriage. Regardless of capitalist and industrialised Western countries or the feudal China of modern times, the government agency still dominated and infiltrated the private spheres of the family and marriage. Western governments particularly, ascribed to themselves a superiority over the Chinese in culture and race. As discussed previously, Chinese Exclusion Acts operated in many places in Western countries for a long time. As stated by Bagnall, interracial relationships between Chinese and Westerners (especially between Chinese men and Western women) were not common, but Western governments still spent much time and energy discussing them, because "their potential dangers and possible social outcomes as

well as the mere possibility of their presence were all destabilising and threatening to the established order and social hierarchies” of Western or Western colonial life.**[clxxx]** Therefore, according to the previous historical analysis, Western governments openly and wantonly interfered with CWIMs, especially marriages between Chinese men and Western women. This interference actually revealed the Western will in controlling its citizens’ bodies, especially in relation to women. The male-dominated government displayed its strong patriarchal intentions in controlling women’s bodies.

According to Foucault, biopower is a system of relations in which “phenomena peculiar to the life of the human species” enter “into the order of power and knowledge.”**[clxxxi]**, and for Foucault, biopower “exerts a positive influence on life, which endeavours to administer, optimise and multiply it, subjecting it to precise controls and comprehensive regulations.”**[clxxxii]** In his work ‘The History of Sexuality’, biopower was defined as a new-style power. The initial form of biopower is manifested as a perceptive power, and in fact it is the ‘anatomopolitics of the human body’.**[clxxxiii]** Foucault attributed power to the body and endowed the body with political and philosophical implications grounded at an ideological level. According to his findings, people in the classical period had already discovered that the body was the object and target of power, and he pointed out that “this body is operated, shaped, and regulated. The body is submissive, cooperative, and it has becoming dexterous and strong.”**[clxxxiv]** Quoting Julien Offroy de La Mettrie’s point of view from her work ‘L’Homme Machine’, Foucault considered that the organismic analogy made between human body and automaton is not a simple metaphor, the human body is also the political doll and miniature manipulated by power.**[clxxxv]** The human body is related to the political domain directly; a power relation directly controls the body, regulates it, and forces it to complete certain tasks. The political controls on the human body are based on a complex interrelation which is closely related to the instrumentalising of the human body. The human body is endowed with power and a dominance relationship as productive forces, and in the meantime it is brought into an affiliation system.

When discussing Lee Kuan Yew’s government’s regulations on birth control, Heng and Devan used Foucault’s theory of biopower to analyse how a patriarchal state agency manipulated ‘National Crisis Exposition’ to legalise its act of controlling the female body.**[clxxxvi]** Ong also adopted a similar concept to discuss the

Malysian state agency's controlling on Islamic women's reproduction.[clxxxvii] Kung used a similar theory to discuss the States' controls on Vietnamese women of both Taiwan and Vietnam governments.[clxxxviii] In this study on CWIMs in modern China, the Chinese and Western governments', but especially the latter's, desire to control the human body was profoundly manifested in controlling women's bodies. Western governments tried and legalised control of Western women's as well as Chinese men's bodies, by mandating usage modes of their bodies. At the same time, when threatened by intercultural marriage, Western governments strengthened the state authority and race boundaries by means of legislating discriminating laws towards Chinese men and promoting the argument that reproduction was a national obligation. Complexities of nationalism and culture were connected in CWIMs. Both Chinese and Western males hold the same horizons in state agencies, implying that the state agency was masculinised. Therefore, it could be observed that the infiltration of governmental power into private domains, and the political and social significance of race discrimination among patriarchal countries were also represented in CWIMs.

Shift in CWIM Gender Ratios:

After reviewing the history of Chinese Western intercultural marriage in modern China, we can see that there was a very peculiar phenomenon of intermarriage between Chinese and foreigners at that time; Chinese men marrying foreign women was relatively common, but few Chinese females married foreign males. More famous Chinese males married Western women than they did Chinese women, although this situation changed very quickly after a few years of the Opening, especially with the establishment of the Republic of China. However, it must be noted that during the period in which, in general, more Chinese men married Western women, more Chinese women married Westerners in Zu Jie such as Shanghai. The situation of more Chinese men marrying Western women lasted for a period of time, but it became a very uncommon phenomenon later in the history of Chinese intercultural marriage. This deserves discussions as it is the most distinctive characteristic of modern Chinese-Western intercultural marriage.

Several reasons could be suggested for the transition: 1) The early students sent to foreign countries were all Chinese men, and no women would have had such opportunities, so naturally, Chinese men had more opportunities to make contacts with Western women. At the same time, all those Chinese men who first came into contact with the West were noble personages with prominent social status which

could make up for the weakness of the nation and the country.**[clxxxix]** 2) Although the WuXu movement helped women obtain equal rights to go to college and study abroad in the same way as men, the feudal system still affected the Chinese strongly, and the long-time absence of women's education resulted in most women being illiterate.**[cxc]** This gap would take time to close, so the trend of fewer women traveling abroad continued. 3) Women were restricted by the Chinese traditional gendered culture and by its patriarchy, while men had more freedom to make choices about their lives. The restrictions of traditional culture upon Chinese women were greater than those on men. Women in China were still conservative, and the patrilineal culture required women to be more obedient and conservative, whereas Chinese men were free of this kind of restraint. 4) The greater proportion of Chinese men marrying Western ladies could also be explained as a kind of special phenomenon resulting from the special context whereby there were insufficient local Western men, as happened in the First World War. 5) The situation in Zu Jie was very different from that of greater China in that era, because more Western men came to Zu Jie as government officers and soldiers. A reason more Chinese women married Western men could be that the Westernised culture dominated in Zu Jie, and the power of traditional Chinese culture and family values were greatly weakened, leading to the gradual formation of a mixed and international culture in Zu Jie, which meant that Chinese women in Zu Jie had much fewer constraints in terms of sex and marriage choices. They could marry Westerners without considering traditional family pressures.

This kind of Zu Jie culture actually continued until now in Shanghai, and one of its most distinct examples can be observed in the fact that today's Shanghai women are very interested in marrying Western men and foreigners, and even give priority to Western men when they are considering relationships and marriage.**[cxci]** In summary, at first Chinese men married Western women to a far greater extent than the converse at the beginning of China's Opening, but the situation changed very quickly and much more Chinese women married Western men later on. It was only in special situations that many Chinese men could marry Western wives. Western countries had more severe policies concerned with restraining Western women from marrying Chinese men. Chinese men were particularly discriminated against by policies in this setting. Traditionally, research has focused on the inferior position of Chinese women, to the neglect of the difficulties imposed on Chinese men which led to the placing of them in very

negative emasculated and effeminate positions. This phenomenon merits further discussion and analysis from the perspective of masculinities and sex hegemony in future studies.

Significance of Freedom of Choice:

The marriages occurring between the people of China and those from other countries at this period were the result of free choice on both sides. Compared with the prevailing marriages arranged by parents in China at that time, they could be regarded as the earliest models of free marriages. In China. The Chinese people who married foreigners at that time were those who had the chance to make contact with foreigners. Besides this factor, they usually had special experiences and statuses which dissociated them from mainstream Chinese culture, and, consequently, these transnational marriages were tolerated by public opinion of society in general. For example, Qian Xiuling's case mentioned earlier was an example which represented the significance of free choice. Qian Xiuling broke her engagement with her Chinese fiancé and associated with a Belgian man. Qian's case of CWIM represented that Chinese women were beginning to have the courage to decide their own marriages, which indicated the progress of Chinese society and the gradual breaking down of traditional shackles on Chinese women. Compared with the CWIMs later in today's Contemporary China, CWIMs in earlier modern China had less clearly defined patterns and were less deliberately sought out. Chinese people who married Westerners in this period were not so utilitarian about choosing Western partners, and they usually married on the basis of affection and their experiences while staying in Western countries.

Cultural conflicts in CWIMs:

As stated by Mary Kibera, "it is clear that in life there is no perfect marriage because perfect people do not exist and consequently, neither do perfect spouses."**[cxcii]** There is no perfect marriage, and even a healthy marriage will always have its share of conflict. Due to lack of adequate historical data, it is hard to carry out a precise study on the cultural conflicts in CWIM. There were many affectionate CWIMs of that time; however, marital conflicts of CWIM in modern China are exemplified by Li Fang's case mentioned earlier. Li Fang eventually divorced his British wife and this was the first international divorce to be recorded in modern China. They both chose divorce without hesitation. The conflicts between the Chinese and Western cultures were embodied in their

marriages.

4.3 Chinese-Western Intercultural Marriage in the Communist era (1949-1979

During the Communist era, there were much fewer international marriages in China because of political reasons and diplomatic policy. However some books and memoirs did sporadically record the existence of Chinese-Russian couples, as many Chinese men had entered successful love-based marriages with Russian wives (for example: Pál Nyíri[**cxciii**], Khoon Choy Lee[**cxciv**]). On May 1, 1950, People's Republic of China (PRC) published and implemented the first Marital Law which clearly prescribed adherence to the basic principles of free marriage: monogamy, and gender equality.[**cxcv**] According to this, in 1954, the Ministry of Foreign Affairs of PRC formulated Preliminary Prescriptions upon Consular Work which set out six functions concerning consular work. As the first law regulating consular work of the new government, the third article prescribed that the consul could "issue passports, visas, notarization and authentication, and handle some relevant civil affairs of overseas Chinese."[**cxcvi**] This article prescribed "handling some relevant civil affairs of overseas Chinese", and therefore became a guide for the Central People's Government of PRC to handle "consular marriage registration" in the early days.

In respect of international laws, first, China solved the problem of double nationality by entering agreements with Indonesia, Malaysia, Philippines, Thailand and other Southeast Asian neighbouring countries.[**cxcvii**] Therefore, Chinese consuls could deal with marriage registration, notarisation and authentication of marital status for Chinese citizens residing abroad and for foreign citizens of Chinese origin. Second, the first series of bilateral consular treaties (altogether three) between China and foreign countries were signed, the Consular Treaty between PRC and DDR of January 27, 1959 in Beijing, the Consular Treaty between PRC and USSR of June 23, 1959 in Beijing, and the Consular Treaty between PRC and Czechoslovakia of May 7, 1960 in Prague. These three treaties prescribed that consuls had the right to notarise and certify, and, with the Consular Treaty between PRC and the USSR, the consul was entitled to handle marriage or divorce registration between citizens from sending countries.[**cxcviii**] These all were given a judicial basis so that Chinese consuls could handle marriage registration for native or foreign citizens, and the notarisation and authentication of marital status. Since the early 1960s, influenced by the ultra-Left trend of thought during the Cultural Revolution, the

relationship between China and other countries had worsened. At the end of the 1960s, the number of Chinese consulates in other countries was reduced from 14 to 5. During this period, signing of bilateral consular treaties or agreements ceased. It was almost impossible for Chinese to marry foreigners during the Cultural Revolution.**[cxcix]** And there were almost no records of marriage registration for native or foreign citizens by Chinese consuls, or the notarisation or authentication of marital status.**[cc]**

During the Cultural Revolution from 1966 to 1976, for political reasons there were few Chinese-Western intercultural marriages .At the beginning of PRC, the characteristic of its foreign policy was “Yi Bian Dao”; this expression literally meaning “lean to one side” and underlines China’s policy of focusing its diplomatic alliances on relations with Russia and the Eastern Socialist countries rather than Western Capitalist countries).**[cci]** After the Second World War, to the Chinese mind, the world appeared to be divided by an opposition of ideology into a capitalist and a socialist camp. The Communist Chinese government deemed that the US-led Western imperialistic countries adopted a hostile attitude towards China politically, enforced by an economic and military blockade against China, and this constituted a huge threat to Communist China. Under such circumstances, China stood firmly with the socialist camp headed up by the USSR, and successively established diplomatic relations with 17 countries (most of them socialist), in order to avoid being absolutely isolated.**[ccii]** This was the honeymoon period of the China-USSR relationship**[cciii]**, so Russians and Chinese could associate with each other freely, and it also produced some Chinese-Russian marriages. Many Chinese students were sent to the Soviet Union and many Soviet engineers and cadres came to China. During this period, many Russian women married Chinese men and Chinese women married Soviet men.

Although in the 1970s, China paid attention to improve the relations between China and capitalist countries, the ideological differences between the communist and the capitalist societies had placed a great barrier to intercultural marriage between China and the West. In the Communist era, Leftist Thought was prevailing in China, and international marriage was not encouraged, furthermore, restrictions were actually imposed on international marriages. Mainland Chinese marrying foreigners or even Chinese from Taiwan and HongKong were considered to “yearn for Capitalism”, which was a stigma and imputation for Chinese people**[cciv]** , so most Chinese were afraid of having this relationship

and were also forbidden from doing so. There were two reasons for this. Firstly, many Western countries were conducting a blockade on China; secondly, the ultra-left trend of thought was in vogue. In these conditions, “Haiwai Guanxi (Overseas Relations)” was equated with “Counterrevolutionary Relations”.**[ccv]** This was connected with the official Chinese ideology on class analysis of the world of the time. It was deemed that the geographical political powers in the world were divided into two camps: the enemy camp consisted of DiXiuFan (imperialist, revisionist and reactionary forces and countries); the friend camp consisted of Asian-African-Latin American (it refers chiefly to the developing countries) and China. In this setup, China believed that there were fierce class-wars operating in the world of that time. DiXiuFan was trying to seek any possibility to eliminate Communist China by means of methods as diverse as military invasion and peaceful evolution. Therefore, anything related to the West and Taiwan (for example, Western media outlets such as Voice Of America and the British Broadcasting Corporation) was assumed to contain evil intentions and conspiracies, or dangerous capitalist propaganda. Naturally, the Chinese people who had “Haiwai Guanxi” were firmly believed to have a “reactionary social basis”. Chen Boda**[ccvi]** even said that the areas with more returned overseas Chinese were the “U.N of spies”.**[ccvii]** “Haiwai Guanxi (Overseas Relations)” meant that Chinese citizens who lived in mainland China had friends and relatives outside of mainland China (especially in Europe, USA, Taiwan and Hong Kong). The people who had Haiwai Guanxi were considered to have complicated social and historical backgrounds, and were suspected of collaboration with the enemy; they would not be trusted or employed because of these assumptions.**[ccviii]**

Under such circumstances, intercultural couples who had married before this period were in a very difficult situation. Some Western wives also suffered a lot from their husbands. The scientist Tang Peisong’s Canadian wife, became blind because of bad nutrition and lack of medical supplies. She had to escape back to Canada from Kunming in the rear with two children during pregnancy. Later, when Mr. Tang went to visit her, she did not return to China with him as she was scared of the hardship. As Mr. Tang did not want to leave China, they separated.**[ccix]** Due to the upheaval during this hundred year period in China and the frequent succession of revolutions, it was inevitable that wives would suffer from various hardships, such as Li Sanli’s wife Lisa,**[ccx]** and the “Red Prisoner” Tang Youzhang’s wife Yiliuxinna Selma Vos, the Dutch wife of Cao Richang, whose Chinese name was Wu Xiuming. Her husband, Cao, was the

director of the Institute of Psychology, at the Chinese Academy of Sciences. She was mistakenly regarded as an international spy merely because she was not Chinese. After suffering such wrongful treatment, she committed suicide by slitting her wrists.**[ccxi]** In the early days of the Founding of PRC, especially before China returned to the United Nations in 1971, the Soviet Union assisted in China's construction, many Chinese students were sent to the Soviet Union and many Soviet engineers and cadres came to China. During this particular period, many Russian women married Chinese men and Chinese women also married Soviet men.

With the despotic power of the Cultural Revolution, "Six Stipulations of Taking Order with Cadres Having Overseas Relations" was constituted in Guang Dong in October of 1969 as a warning to others because Guang Dong was the province which had the earliest and most frequent connections with foreign countries. It stipulated: "all the cadres who have Haiwai Guanxi, no matter what occupation their oversea relatives are doing, if they still keep political or economic contact with their oversea relatives even after educating, will be severely dealt with. ...Investigations must be undergone to find out cadres who have Haiwai Guanxi, and the necessary critical and struggling education should be carried through depending on the situations. The ones who have severe situation must be cleaned out from cadre team. ...From now on, the people who have Haiwai Guanxi will not be qualified to be employed as cadres, and cadres' marriage must be seriously and strictly censored..."**[ccxii]** This stipulation was quickly implemented in Guangdong Zheng Dang Gongzuo Huiyi (Guangdong Consolidating Party convention) subsequently. In the name of "Clearing up class team", many cadres and employees who had Haiwai Guanxi were fired from their employment or sent to the countryside and outlying districts. Normal correspondence with relatives and family members in foreign countries was labeled as "Li Tong Waiguo (maintain illicit relations with a foreign country)"**[ccxiii]**, and the money sent from family members from foreign countries was labeled as "Spy Funds".**[ccxiv]**

In the shady atmosphere of arrests of "betrayers" and "spys", many local and returned Chinese were seriously impacted and unjust, false or wrong charges occasionally were leveled against them. Although having Haiwai Guanxi had never been regulated officially and publicly as a crime, the ordinary Chinese people of the time who had been educated for many years in the concept of Class Struggle were inclined to equate having Haiwai Guanxi with contact with the

enemy. It was therefore universally acknowledged by Chinese people that they should maintain sharp vigilance of those who had Haiwai Guanxi. Some posts which needed complete secrecy, such as high-tech national defence scientific research and factories, air force, etc. would not recruit a person with Haiwai Guanxi. Personnel and organisation departments did not employ people with Haiwai Guanxi either.

Because of the strict Policy restrictions, the Chinese Civil Administration Department and Marriage Registration Authority adopted the “the less trouble the better” guideline, and this prevented many Chinese people from marrying their lovers in foreign countries. Even Guangdong, the famous home town of overseas Chinese, could not escape from this policy. The “Zijin Affair” was a very typical case in Guangdong in 1973. In this year, the Department of Civil Affairs in Zijin County transacted a marriage registration for an American Chinese husband and his local Chinese wife. The American husband was disabled, so this registration was labeled as “humiliating the nation and forfeiting its sovereignty”. The Director of the Department of Civil Affairs at Zijin County was expelled from the Party and discharged from his public employment, and more than twenty other staff members were involved. With the influence of this affair, international marriage registration and even the marriage between local Chinese and illegal immigrants from other countries were prohibited in Guangdong province. It was not until 1976 that Guangdong province secretly resumed marriage registration for local Cantonese and overseas Chinese as well as compatriots from Hong Kong, Taiwan, and Macau, which allowed many international lovers to finally marry. From 1973 to 1978, Guangdong transacted 6431 international marriage cases (an average of 1072 annually) including Chinese locals with foreigners, Chinese of foreign nationalities, overseas Chinese, and compatriots from Hong Kong, Taiwan, and Macau.**[ccxv]** This was a very rare phenomenon of Chinese international marriage during the Cultural Revolution.

1.4 Chinese-Western Intercultural Marriage in the Reform Era and the New Century (after 1978 and onwards)

As discussed above, during the 30 years of isolation, particularly during the Cultural Revolution, international marriages in China were almost non-existent. National conditions sometimes played a decisive role in determining marital choices. Before the end of the Cultural Revolution in 1976, marriages with foreigners were regarded as outrageous treachery.**[ccxvi]** After this period,

consular relations between China and other countries revived and developed greatly. After the Cultural Revolution, the reform and opening-up quickly changed China's historical development, which not only enabled the Chinese to enjoy freedom in the economic field, but also endowed them with greater personal liberty in their emotional world. Henceforth, the history of prohibitions and restrictions upon transnational marriages in modern and contemporary China became coherent again.

In 1978, China implemented its Reform and Opening Policy^[ccxvii], and on 1 January 1979 China and the United States formally established diplomatic relations.^[ccxviii] China carried out a “nonalignment policy” and “No Enemy Countries’ diplomacy” and developed friendly relationships with most countries in the world.^[ccxix] During this period, the Chinese consular judicial system was been continuously improved. The marriage registration, notarisation or authentication of marital status transacted by Chinese consuls for native or foreign citizens has increased annually. From the aspect of international law, the entry of China into the Vienna Convention on Consular Relations marked that the Chinese consular judicial system was in line with international standards.^[ccxx] Paragraph 6 of Article 5 in this convention prescribed that consular responsibilities included “acting as a notary, civil registrar or similar jobs and transacting some administrative work, but limited by the laws and regulations of the receiving countries.” This paragraph offered a principled description about marriage registration for citizens by consuls and notarization or authentication of marital status.^[ccxxi] On July 3, 1979, the Central People's Government of CPC applied to the Secretary General of the United Nations to join Vienna Convention on Consular Relations, and since August 1 of the same year, the convention has been in force upon China.

During this period, China also signed, revised or resigned various bilateral consular contracts or agreements with foreign countries. Up to now, among 42 bilateral consular contracts or agreements between China and foreign countries, there are 37 with articles concerning consuls' authority to transact marriage registration. Based on these, Chinese consuls can transact marriage registration, and do the work of notarisation or authentication of marriage status for native or foreign citizens on a larger scale.^[ccxxii] Until the end of 2003, there were 239 professional and honorary consuls established or to be established by foreign countries in Mainland China, Hong Kong, and Macao, and there have been 69

professional consuls established or to be established by China in foreign countries. Along with acting institutions as consuls in diplomatic missions mutually established by China and 165 countries, the platform for the development of consular relations between China and other countries has been enlarged. Since then many international marriages have been transacted in China. The international marriage can be seen as the outcome of the Reform and Open Policy and China's active foreign policy, as well as its symbol. The Reform and Open and the foreign policies were the precondition and basis of the emergence of international marriage in contemporary China. China has been obtaining a secure and reliable international environment of lasting peace and stability which has propelled the economy forward at a high speed in China and led to an increase in international marriages there.

After the Third Plenary Session of the 11th Central Committee of the C.P.C. in 1978, China implemented its Reform and Opening-up policy, especially in particular economic zones like Guangdong and Fujian Provinces, and some coastal cities, where special policies and flexible measures were carried out. Ideas and operations in transnational marriages gradually changed the long-established notion of closing off China. From the central authorities down to the local districts, the principle of "loosening and quicker work" was adopted. As long as both men and women met the requirements of the Marriage Law, no organisation or person had the right to interfere, as it was deemed an infringement upon free marriage. Since 1978, China has achieved social stability and economic prosperity through reform, opening up to the outside world and modernising. The national strength of China has increased greatly and the number of foreigners, Chinese who are foreign nationals, overseas Chinese and compatriots from Hong Kong, Taiwan, and Macau coming to China has been increasing year after year. More and more of them are coming to China to travel, visit families, run businesses, and run factories. Meanwhile, Chinese men and women have more opportunities to associate with foreigners.

With the adoptions of flexible policies in relation to international marriage registration, the number of international marriages between Chinese and foreigners in mainland China has been increasing enormously, and its growth rate has been keeping at a rate of 10 times the previous year. From 1979 to 1989, China transacted 128613 international marriage cases, in which 3853 cases were of foreigners/Chinese, 8818 cases were of Chinese with foreign national/Chinese,

19597 cases of overseas Chinese/Chinese, 96345 cases of compatriots from Hong Kong, Taiwan, and Macau/Chinese. From 1978 to 2008, China transacted 824510 international marriage cases, in which there are 306422 cases of foreigners and Chinese with foreign national/Chinese, 109784 cases of overseas Chinese/Chinese, 408304 cases of compatriots from Hong Kong, Taiwan, and Macau/Chinese.**[ccxxiii]** It can be seen from the table below that cross-nation marriages in contemporary China have been dramatically increasing over these years.

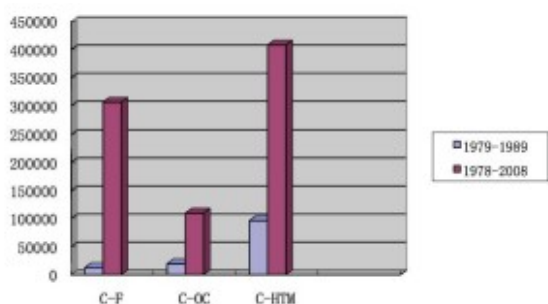


Table 1.1 Comparison of Marriages between Chinese and Foreigners (C-F), Chinese and Overseas Chinese (C-OC), and Chinese and Compatriots from Hong Kong, Taiwan & Macau (C-HTM). In 1979-1989 and 1978-2008

In this period, laws related to international marriage were improved gradually. At the beginning of the Reform and Open policy implementation in 1978, a Chinese male graduate student applied to marry a French female student who was studying in China, however the local government could not establish legal grounds for the marriage and had to report the case to the Ministry of Civil Affairs.**[ccxxiv]** After the Third Plenary Session of the 11th Central Committee, the Chinese State Department and Ministry of Civil Affairs constituted a series of generous and liberal policies for international marriage registration on the basis of the Reform and Open guidelines. The civil administration departments at all levels were required to follow the primary instruction, "...on the matter of Chinese-Non-Chinese marriages, the consuetudinary conservatism of our belief system should be broken down, and leading cadres at all levels must emancipate the mind, dispel misgivings, break the bondage of "Leftist" thinking, and

transform ideology in order to improve their work.[ccxxv] The continuous revision, supplementation and improvement of Chinese national laws and regulations also created a greater legal basis for Chinese consuls to transact marital registrations, and do the work of notarisation or authentication of marital status for native or foreign citizens. On September 10, 1980 and April 28, 2001 respectively, the Chinese government revised and supplemented the Marriage Law.[ccxxvi]

The Chinese Ministry of Civil Affairs gradually established and standardised the regulations of international marriage between mainland Chinese and foreigners, Chinese with foreign nationals, overseas Chinese, and compatriots from Hong Kong, Taiwan, and Macau from 1983 onwards. Meanwhile, the marriage registration authorities all over China also gradually resumed their handling of international marriages. This was the first special law regulating international marriage between Chinese citizens and non-Chinese individuals in contemporary China, Provisions for the registration of marriage between Chinese citizens and foreigners, was synchronously issued in the same year[ccxxvii] , and was followed by the successive promulgation of related regulations on administering marriages between mainland Chinese and compatriots from Hong Kong, Taiwan and Macau.

In August of 1983, the State Department officially authorised the civil administration departments in all the provinces, municipalities and autonomous regions to administer and manage the registration of international marriages on behalf of the Central People's Government, and international marriage management in China was placed on a regularised, legal track. In 1983, the Ministry of Civil Affairs issued Provisions for the Registration of Marriage between Chinese Citizens and Foreigners, while in the same year, the Ministry of Foreign Affairs, the Supreme Court, the Ministry of Civil Affairs, the Ministry of Justice, and the Office of Overseas Chinese Affairs under the State Council jointly issued Provisions for the Registration of Marriage for Overseas Chinese by Embassies and Consulate. In 1997, the Ministry of Foreign Affairs and the Ministry of Civil Affairs together issued Administrative Regulations on the Registration of People Going Abroad, and on August 8, 2003, the State Council issued its 387th order. Regulations on Marriage Registration, which was implemented on October 1 of the same year laying down specific descriptions about marriage registration, notarisation or authentication of marital status by

Chinese consuls for native or foreign citizens. Among these articles, the latest change was that according to relevant provisions in the new Regulations on Marriage Registration, Chinese consuls would transact marriage registration based upon the signed statement provided by the marriage parties stating, “I have no spouse. Neither do I have lineal nor consanguineous relations within 3 generations with the other party.”

The same applied to the transaction of notarisation or authentication for marriage parties within the Chinese territories.**[ccxxviii]** One particular incident also led to the relaxation of restrictions upon transnational marriages. In 1979, the 22-year-old Li Shuang, a Chinese painter, fell in love and lived with Bai Tianxiang, a French diplomat in the Culture Division in the Beijing Embassy. As this was an unusual occurrence at the time, the girl was labelled as “selling information to foreigners” and “damaging national dignity”. Subsequently, she was punished with a 2-year regime of reeducation through labour and her French lover was banished from China. This incident so shocked French political circles and the French media that during French President Mitterrand’s visit to China he specifically asked the then Chinese leader to release Li Shuang. On Deng Xiaoping’s instructions, at the end of 1983, Li Shuang was finally reunited with her lover in Paris. After this incident, investigation by the public security organs of government was also abandoned in the cases of application for transnational marriage.**[ccxxix]**

Guangdong, Shanghai and Fuzhou were the three areas with the earliest, the most numerous and the most representative international marriage cases. They are thus illuminating focus points through which to examine the phenomenon.

Fuzhou is a famous hometown of overseas Chinese as well as one of the first coastal cities to open to the outside world. Fuzhou resumed international marriage registration in 1979. In September of 1983, the People’s government of Fujian province mandated that the Fuzhou Bureau of Civil Affairs was the department for international marriage registration in the Fuzhou area, and that marriages between mainland Chinese and compatriots from Hong Kong, Taiwan and Macau could be managed by the Bureau of Civil Affairs in different cities and counties. From 1979 to 1994, Fuzhou transacted 8,260 international marriages, of which 47.21% (3889 cases) were marriages between mainland Chinese and compatriots from Hong Kong and Macau, 9.2% (758 cases) were marriages between mainland Chinese and compatriots from Taiwan, 23.6% (1949 cases)

were marriages between mainland Chinese and overseas Chinese, 12.1% (996 cases) were marriages between Chinese with foreign nationals, and 8.01% (668 cases) consisted of international marriages between mainland Chinese and foreigners. From 1995 to 2002, Fuzhou transacted 38505 international marriage cases (without cases of compatriots from Hong Kong and Macau), of which 50.9% (19597 cases) were marriages between mainland Chinese and Taiwanese, 49.1% (18908 cases) were intermarriages between mainland Chinese and foreigners, overseas Chinese and Chinese with foreign nationals. In short, international marriages across the broad range of different combinations developed very quickly. We can see this from the statistics. There were only 2,720 international marriage cases from 1979 to 1988 in Fuzhou, but there were more than 7000 cases in Fuzhou per year after 2000. In the year 2000, international marriages in Fuzhou numbered 7,370 cases (without cases of compatriots from Hong Kong and Macau). This was more than the total summation of the other four municipalities (Beijing, Shanghai, Tianjin and Chongqing), which accounted for one sixth of international marriage cases in China in that year.**[ccxxx]**

In respect of Shanghai, since 1980, international marriage experienced four stages. These were characterised by, first, an increasing number, second, relative stability, third, a rapid increase and, fourth, undulation. In 1980, there were only 396 international marriage cases registered, which comprised only 0.2% of the total amount of marriage registrations in Shanghai of that year. It can be seen that the rate correlates with the degree of open contact with the outside world. From 1980 to 1985, Shanghai's international marriage rate increased steadily, and with 826 cases in 1985, which was 1 times more than the number of cases in 1980. A short stagnation in the rate then occurred between 1986 and 1988, for each year there were around 800 cases registered. 1989-1992 was the most productive growth phase of international marriage in Shanghai, the number of cases increased from 802 in 1989 to 2,555 by 1992, with an average annual growth rate of 33.6%. After the short stability during 1993 and 1994, the number increased and exceeded 3000 cases in 1995, after which the number fluctuated around the level of 3000 cases each year. It reached its topmost level of 3,442 cases in 2001, but a sharp decline followed in 2002 with a figure of 2,690 cases, which occupied 3% of the total amount of marriage registrations in Shanghai of that year. The rate of international marriage in Shanghai was not only much higher than the average national level in China, but also was higher than the rate in Guangdong where was a high degree of open contact with the outside

world.[ccxxxi]

Guangdong was the third of the three major focuses of international marriage. In 1979, the Department of Civil Affairs of Guangdong province promulgated “Some comments on acting well in the registration work for international marriages between local Chinese and overseas Chinese, compatriots from Hong Kong & Macau, and foreigners”[ccxxxii] , and insisted that no greffiers may discriminate against participants of international marriages but they should treat them equally in their administration of international marriage registration. They were also required to be conscientious to conduct registration according to the relevant State provisions and applicable codes, as well as the policies for overseas Chinese in that they must “...give appropriate preferential treatment on the basis of characteristics...”[ccxxxiii] The registration place of international marriage with overseas Chinese and compatriots from Hong Kong and Macau was changed from their original hometowns to the registered permanent residence of the Chinese spouses. Since then, international marriages between mainland Chinese and foreigners, Chinese with foreign nationals, compatriots from Hong Kong and Macau have been increasing annually. Guangdong only transacted 591 cases of international marriages (including marriages between mainland Chinese and foreigners, Chinese with foreign nationals and compatriots from Hong Kong and Macau), but 12,835 cases were registered in 1986, which is 21 times more than the number in 1976. Guangdong transacted 850 cases of international marriages in 1977, and its number in 1987 rose to 15092, which is 17 times more than the earlier figure.[ccxxxiv]

According to Sociologist Deng Weizhi’s research, international marriages after Open and Reform have some special characteristics, and he summarised them as follows:

- 1) Fast development; since 1980, the numbers of international marriages in China have been increasing year by year. For example, China transacted 14,193 cases of international marriage in 1980, increasing to 23762 in 1990, and to 50773 in 1997;
- 2) Wide geographic distribution; international marriages in China have involved foreigners from 53 countries and areas. The majority of foreign spouses are from America, Canada, Japan and Australia;
- 3) The Chinese overseas and Chinese with foreign nationals, make up the largest proportion of foreign spouses, which proportion in Chinese international

marriages is about 70%;

4) More Chinese women married outside of China: 90% of Chinese international marriages consist of Chinese wives and foreign husbands, and only less than 10% involve Chinese husbands with foreign wives. This accords with the general world trend, M. Belinda Tucker and Claudia Mitchell-Kernan found that “female outmarriage is higher than male outmarriage for every major racial ethnic group except blacks”**[ccxxxv]** ;

5) Low educational level: in general, the Chinese spouses involved in international marriages registered in China are of a low educational level, particularly in the marriages of Chinese to Japanese, in which both Chinese and Japanese spouses are of low educational level. By contrast, the Chinese spouses who married Westerners comparatively have a better educational level, for example holding PhDs, positions as CEOs or general managers.**[ccxxxvi]**

In 1999, Chinese sociologists Ru and Lu identified several problems in international marriages in China:

1) The basis of many international marriages is not love;

2) There are big age gaps between the Chinese and their foreign spouses, some gaps are similar to “a grandpa marrying a granddaughter”;

3) Many Chinese married foreigners only after a short time of getting to know each other in so called flash marriages;

4) Marital fraud is a serious problem between Chinese women and foreign men;

5) The divorce rate in Chinese international marriages is very high. The speed at which the divorce rate is growing is even higher than that of the marriage rate. From 1990 to 1995, the numbers of international marriages increased 2.4 times, but the divorce rate increased 2.8 times. The divorce rate of 1990 was 20% of the marriage rate, and the divorce rate of 1995 was 26% of the marriage rate of the same year.**[ccxxxvii]**

In summary, since 1978 the rate of international marriage has been recovering due to implementation of new government policies and a shifting context in terms of politics, economics and society. Now, more Chinese go abroad and more foreigners enter China. Previously more Chinese women married foreign men than vice versa and this tendency has remained until now and will likely continue into the future. The phenomenon of international marriages always kept pace with China’s macroscopic background and context, however, changes in the microcosmic context also play important roles in increasing or decreasing the

levels of international marriage, for example in family cultures, personal psychology and concepts of marriage.

NOTES

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