

“Taiwan as the Nexus of China-Japan Relations: In the Shadow of Japan’s Rising Sun, 1871-1950.”

(Part I of a two-part historical analysis of the role Taiwan and Taiwan related issues have played in the evolution of China-Japan relations. Part II is titled “Taiwan as the Nexus of China-Japan Relations: The Rise of China after the Age of Empires, 1950-2007.”)

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Abstract

Diplomatic and political issues concerning Taiwan have consistently been at the center of China-Japan relations. Almost every major moment of transition in the evolution of China-Japan relations has been directly connected to Taiwan affairs. In pre-modern times Taiwan was loosely connected to various governments of China. Shortly after ending a two and a half century period of isolationism in 1868, the Empire of Japan began expansion, thus challenging China’s historical suzerainty over their mutually peripheral territories, including Taiwan. After some minor battles in the mid-1870s, the next major phase of China and Japan negotiating their new modern relationship turned to outright war, and in the end Taiwan was Japan’s main prize. For the next half century Japan’s colonial policies in Taiwan, and Chinese responses to the plight of their former brethren, were instrumental in shaping the development of China-Japan relations. This next phase was concluded by outright war once again, and this time Taiwan was to be China’s prize. When the Communist Revolution split the government of China in 1949, however, the “Chinese recovery” of Taiwan took on entirely new meaning. By 1950 Taiwan was once again at the center of competitive East Asian foreign relations, and Beijing and Tokyo’s respective positions on Taiwan would become *the* dominant element determining their relationship.

Introduction

In pre-modern times China-Japan relations were relatively limited. As the two were separated by sea, most of what little direct relations they had were conducted through maritime trade, and often via the geographic intermediary of the Liuqiu/Ryukyu Islands¹ or Taiwan. When Western nations became increasingly involved in East Asia in the seventeenth and eighteenth centuries, the new web of Westphalian-style international relations they brought with them offered a new mode of intermediary connection. By the mid-nineteenth century both China and Japan began reconfiguring their respective frameworks for international relations in accordance with the new Western paradigm, and the immediate area of ambiguity that resulted was the now inadequately defined status of their former points of peripheral connection – the Liuqiu/Ryukyu Islands and Taiwan.

In pre-modern times Taiwan was primarily inhabited by Austronesian people, distinct from the various ethnicities of China and Japan. Despite contemporary Chinese claims that “Taiwan has belonged to China since ancient times,” the sparse documentary evidence of this establishes little more than previous Chinese administrations *recognizing* Taiwan’s existence, often casually lumping it in with other “outside areas” according to an imagined system whereby all peripheral territories were subordinate to China as the “Middle Kingdom.” In the early- and mid-seventeenth century Dutch and Spanish interests began establishing settlements on Taiwan. Up until 1662 the Dutch East India Company effectively administered large portions of Taiwan, far more directly than any Chinese government ever had.

In 1662 the Dutch were largely driven out by Zheng Chenggong (known by the Dutch as Koxinga), who had been born in Japan to a Japanese mother and a Chinese father, and who

¹ Liuqiu in Chinese, Ryukyu in Japanese.

claimed to be serving the interests of the recently overthrown Ming Dynasty.² Although he had no intentions of serving any Japanese interests, his Japanese heritage is a testament to the nature of Taiwan as an historically intermediate territory between Japan and China. After the Qing Dynasty consolidated their undisputed control of China, they listed Taiwan as an administrative prefecture in 1684, although large portions of the island would remain effectively outside of their jurisdiction (dominated by aboriginal tribes) until the late nineteenth century.

Starting in 1871, when China and Japan began the contentious process of re-defining the status of their peripheral territories, and in turn how those relations would shape direct China-Japan relations, Taiwan came to center stage. Almost every subsequent major point of transition in the development of China-Japan relations centered in one way or another on Taiwan or Taiwan related issues. Although this article will only survey such cases through 1950, Taiwan's centrality in evolving China-Japan relations has remained just as consistent in the last half century as it was for their first.

This article will examine the role Taiwan issues have played in the development of modern China-Japan relations, from their first engagement in 1871 through the start of the Cold War circa 1950. The analysis will be divided into the following sections: 1) The first battles before the war, 1871-1894; 2) The first Sino-Japanese war, 1894-95; 3) The early colonial period, 1895-1912; 4) The latter colonial period, 1912-1943; and 5) The "Recovery" of Taiwan from Japan, 1943-1950.

Throughout the scope of this study, and individually within each sub-period examined, there were three consistent dynamics according to which we can better understand the role

² In 1644 Manchurian invaders overthrew the Ming Dynasty and established the Qing Dynasty in China, which would rule until 1911/1912. When Koxinga began his campaign against the Dutch on Taiwan there were still a few loyalists struggling to restore the Ming Dynasty, many of whom would subsequently flee to Taiwan, no so unlike the Guomindang's evacuation to Taiwan in 1949.

Taiwan issues played. The first dynamic my analysis exposes concerns moments of fundamental change in the regional inter-state order. Examples of such fundamental changes include the replacement of the traditional Chinese “tributary system” with the Western “Westphalian system,” the simultaneous rise of Japanese regional dominance with China’s decline, the division of “Axis” and “Allied” powers in the WWII era, or the emergence of the Cold War. Most significant Taiwan issues examined below were directly shaped by, and often dominated by, these kinds of broader shifts in the regional (and world) order.

The second dynamic exposed reveals that matters of domestic politics in China and Japan consistently had significant impact on how Taiwan issues unfolded, and subsequently how China-Japan relations evolved accordingly. Obviously domestic politics will always affect a government’s approach to international relations, but in the cases studied below we will see that domestic political concerns frequently dominated Taiwan issues far beyond an expected proportion.

Finally, in each time period examined below we will see that the stability of evolving China-Japan relations, through Taiwan issues, was often dictated by the congruity (or incongruity) of domestic political concerns with the broader changes in regional frameworks. In order to clearly understand how Taiwan issues have consistently functioned as center stage of China-Japan relations one will have to appreciate not just the first two dynamics in themselves, but the manner in which they functioned together.

I) The First Battles before the War, 1871-1894

On 29 August 1842 the Empire of China entered into the “Treaty of Nanjing” with Great Britain, thus acknowledging the validity of the Westphalian system of sovereign interstate diplomatic relations. Concerning her regional neighbors, however, China simultaneously maintained the traditional tributary institutions of the long-standing “Chinese world order” system of relations.³ According to this system, “independent” kingdoms such as Korea, Vietnam, and the Liuqiu/Ryukyu Islands were quasi-protectorates, bound and subordinate to Chinese suzerainty as tributary states. Japan had participated in this system at various points throughout the centuries, but, by their own reckoning at least, had never been fully incorporated into it. Since the mid-16th century, neither China nor Japan had even pretended to such a relationship, and formal China-Japan diplomatic relations were functionally non-existent until the 1870s.

On 31 March 1854 the Empire of Japan entered into the “Treaty of Kanagawa” with the United States of America, thus formally acknowledging Japan’s general acceptance of the same Westphalian system. Although Japan had not directly participated in the “Chinese world order” for centuries, acceding to the Western-style treaty (and preparing to forge formal relations in-kind with regional neighbors) indirectly challenged China’s imagined status as regional suzerain. As is so often the case in history, when a long-standing regional framework for interstate relations fundamentally changes, the dominant stakeholders in the previous order tend to resist. This time, not only was the regional order changing, but also the balance of power was enormously complicated by the simultaneous emergence of Japanese power (relative to East Asia) within this system overwhelmingly dominated by the Western powers. It was in this tumultuous

³ For descriptions of traditional Chinese perceptions of the world order see: John K. Fairbank. “A Preliminary Framework.” In *The Chinese World Order*, ed. John K. Fairbank, 1-20. Cambridge: Cambridge University Press, 1968; or Benjamin I. Schwartz. “The Chinese Perception of World Order, Past and Present.” In *The Chinese World Order*, ed. John K. Fairbank, 276-291 (Cambridge: Cambridge University Press, 1968).

context that China and Japan met in the 1870s to forge their own modern relationship. Here, as again many times subsequently, Taiwan would be at the center of this process.

The opening of Japan through the “Treaty of Kanagawa” (and subsequent similar treaties with other Western powers) marked the beginning of the end for the Tokugawa Shogunate,⁴ which had in part based the security and stability of its regime on two and a half centuries of isolationism. As a maneuver of domestic politics, the revolutionaries of 1868 had discredited the Tokugawa regime with the disingenuous (and impossible) patriotic rally-cries of “expel the [western] barbarians,”⁵ but upon gaining power immediately endeavored to expand foreign relations. One of their first targets was China. Shortly after the Japanese Foreign Ministry was created in 1870, one of its first missions was to send Yanagihara Sakimitsu to Beijing to negotiate for a commercial treaty along the lines of those China had already signed with various Western powers.

Li Hung-chang was the primary statesman for Chinese foreign affairs from 1870-1901. More so than any other, his vision and voice set China’s course for this initial phase of China-Japan relations, and he would personally negotiate both this first round of engagement in the 1870s, and the more critical round during the Sino-Japanese war of 1894-5 (both culminating in treaty agreements defining the status of Taiwan, first as a province of China, then as a colony of Japan). When he was first approached by Yanagihara in 1870 he was generally amenable to not just a Western-style diplomatic relationship, but also the possibility of an alliance that might strengthen their respective positions vis-à-vis the Western powers. Unlike the Japanese revolution (Meiji Restoration) in the face of Western imperialism, in China the humiliating defeat by Great Britain in 1842 inspired a “self-strengthening” movement aimed to revitalize the

⁴ Tokugawa Period, 1603-1868.

⁵ In Japanese, *sonnō jōi* (revere the [heretofore figurehead] emperor, expel the [western] barbarians).

current regime. After the monumentally catastrophic Taiping Rebellion of 1851-64 (in which as many as 20 million Chinese died, and Li Hung-chang gained significant political prestige and office suppressing), the self-strengthening movement was redoubled. This was the dominant domestic political climate and context in which China's new foreign relations were calculated. It's doubtful that Li Hung-chang felt any genuine affinity for a Japan he may have considered little more than an upstart former tributary. However, just as the domestic political climate in Japan dictated the route to securing a position in the changing regional order, so too was Chinese foreign policy influenced.⁶

Despite a momentary congruence of domestic and international interests in both China and Japan, and furthermore between the two, the enduring effects of China's suzerain/tributary perspective prevented a precise common language for negotiating their new relationship. By 1871 Yanagihara's successor, Date Munenari, had successfully negotiated the 18-article "Sino-Japanese Amity Treaty" with Li Hung-chang, nominally inaugurating their modern relationship as equal, sovereign nations. They also signed a 33-article trade regulation agreement. Perhaps not even realizing the extent of the ambiguity engendered by their differing perspectives on international relations, Article 1 of the Treaty simply read – "In all that regards the territorial possessions of either country the two governments shall treat each other with proper courtesy, without the slightest infringement or encroachment on the other side." For the Chinese, the term "territorial possessions" naturally included the traditional tributary states of China's periphery. For the Japanese, "territorial possessions" applied only to territory legally and fully incorporated

⁶ See Liang Po-hua, "Yang-wu yun-tung shih-ch'i Man-ch'ing wai-chiao cheng-ts'e chuan-pien ti shen-chueh" (Diplomatic change in China during the Self-Strengthening Movement period), *Shi-ch'ao* 7 (October 1971): 7-24, and Edwin Pak-wah Leung (Liang Po-hua), "The Quasi-War in East Asia: Japan's expedition to Taiwan and the Ryukyu Controversy," *Modern Asian Studies* 17, no. 2 (1983): 257-281.

into their respective state administrations.⁷ As it happened, later that same year this unforeseen ambiguity would become critically relevant when 54 shipwrecked sailors from the Liuqiu/Ryukyu Islands (claimed by China as a tributary state, and, unknown to them, by Japan as a legal domain of the Japanese Empire) were massacred by aborigines on Taiwan (claimed by China as a legal domain of the Chinese Empire, but only partially incorporated, as demonstrated by the free reign of the massacring aborigines in significant portions of Taiwan).

In negotiating for the 1871 Treaty, Japan was not able to secure a desired most-favored-nation clause, and remained eager for opportunities to revise both the Treaty and various areas of ambiguity slowly becoming apparent. The incident of the massacred Liuqiu/Ryukyu sailors on Taiwan was precisely the opportunity they were looking for. This was also the moment when the Americans would first become unofficially involved in the China-Japan Taiwan issue. Date Munenari had been fired from his post for having failed to secure inclusion of a most-favored-nation clause in the 1871 Treaty, and Yanagihara was recalled to make further attempts. By chance he happened to read of the massacred Liuqiu/Ryukyu sailors in the 11 May 1872 *Peking Gazette*, and quickly reported this to Tokyo on 19 May. On 12 August the governor of Kagoshima Prefecture (Ôyama Tsunayoshi), which had administrative jurisdiction over the Ryukyu Islands, submitted a report on the matter to the Foreign Ministry, recommending a punitive expedition to Taiwan in response. (This possible punitive expedition was supported by,

⁷ Over the next 130 years there will be numerous occasions of ambiguous wording in treaties and the like concerning the status of Taiwan relative to China, Japan, and the United States, which will similarly cause controversy and tensions. In particular, consider the ambiguity of the Shanghai Communiqué of 1972, in which the U.S. “acknowledges” the one-China policy without endorsing it; the ambiguity of the Taiwan Relations Act of 1979, in which the U.S. effectively commits to the defense of Taiwan having simultaneously withdrawn from the Mutual defense Treaty of 1954; or the ambiguity of the term “areas surrounding Japan” in the 1996-97 revision of the U.S.-Japan security alliance, which implies Japan’s potential right to intervene in issues concerning Taiwan, no so unlike as occurred in the mid-1870s.

among others, Saigō Takamori, Itagaki Taisuke, and Soejima Taneomi.⁸ These are some of the same figures who were leading the growing pro-war clique in the fracturing Meiji government.) As such possibilities were being considered, Tokyo transferred jurisdiction of the Ryukyu Islands to the Foreign Ministry. When the Foreign Ministry informed the United States, France, and the Netherlands of this change, they also asked the Americans for details on how they had organized a punitive expedition to Taiwan five years earlier, in response to a similar massacre of shipwrecked American sailors.⁹ The American minister in Tokyo, Charles E. De Long recommended they seek the advice of General Charles W. LeGendre (presently the American consul at Amoy) who had led the expedition along with Rear Admiral H.H. Bell. De Long also advised that Japan's punitive expedition be conducted immediately. As far as the international community was concerned, it seemed that the 1867 American expedition could be a justifying precedent.

After LeGendre had been recruited as an unofficial advisor, he stirred up considerable enthusiasm for the expedition. LeGendre advised Foreign Minister Soejima that China's inability to effectively administer Taiwan would inevitably lead to its seizure by a foreign power. Why not by Japan? He went on to prepare detailed plans for how Japan could expand a punitive expedition to outright conquest of Taiwan. In particular, he anticipated that China's inevitably forthcoming claim to sovereignty over all of Taiwan could be nullified by indisputable lack of effective administration of the aboriginal areas.¹⁰ On 15 November 1872, LeGendre was formally commissioned as an official advisor, despite U.S. objection to such employment of its

⁸ Matsuda Michiyuki, *Ryūkyū shobun* (The Disposition of Ryūkyū), 3 vols. (1878); reprinted in *Meiji bunka shiryō soshō* IV (Tokyo, 1962), 9-10; *Nihon gaikō bunsho: Meiji nenkan tsuiho* (Diplomatic Papers of Japan: supplement to the Meiji period) (Tokyo, 1964), 104; and cited in Leung 1983: 266.

⁹ Leung 1983: 267; the record of this can also be found in *Nihon gaikō bunsho: Meiji nenkan tsuiho*, 105-200.

¹⁰ In various stages of the American debate concerning the PRC's claim to sovereignty over Taiwan a similar argument has been made that lack of an actual ability to enforce sovereignty nullifies any such claim. Also, this basic dynamic is not uncommon in modern history. Consider for example the international support of Israeli intervention in and occupation of southern Lebanon in response to Beirut's inability to control Hezbollah.

citizens in a foreign government's military affairs.¹¹ In the spring of 1873 Soejima led a mission to Beijing in which the matter of China's jurisdiction over all of Taiwan was to be discussed. By 21 June Yanagihara informed the Chinese that Japan definitely planned to carry out the long awaited punitive expedition. From the Chinese perspective this was a violation of the 1871 Treaty which forbade "infringement or encroachment" on each other's "territorial possessions." Furthermore, it was a two-fold affront in that the Chinese considered defense of sailors from the Liuqiu/Ryukyu Islands their responsibility, and any punishment of Taiwanese aborigines purely an internal matter.

Once again, however, matters of domestic politics would be the dominant factor determining the course for such foreign policy developments, and the expedition would be delayed by major factional disputes within the Meiji government. Simultaneous with debate over an expedition to Taiwan, there was also debate over a possible invasion of Korea. The champion of this idea was Saigô Takamori, mentioned above. Eventually Saigô and his allies would be overruled, resulting in their defection from the government they had been instrumental in forming, and eventually even a quickly defeated counterrevolution in 1877. For the time though, in 1873, the Taiwan expedition was briefly delayed, but then revived with enthusiasm. Even acting premier Iwakura Tomomi, who was the decisive leader of the "peace" clique *against* Saigô's militarism, supported the Taiwan expedition. In fact he even went so far as to say, "I hope a plan will be adopted to make it our dependency," betraying the fact that the "punitive" expedition was transforming into a plan for colonization.¹² Though invasion of Korea was ruled out as being infeasible, perhaps the Taiwan expedition served a critical ulterior purpose of mollifying the discontent pro-war clique. [This will hardly be the last time that exactly such a

¹¹ Leonard Gordon, "Japan's Abortive Colonial Venture in Taiwan, 1874," *The Journal of Modern History* 37, no. 2 (June 1965): 172.

¹² Gordon 1965: 175.

dynamic in domestic politics, both in Japan and the U.S., will be played out through Taiwan issues.] It is important to recognize here that the Japanese expedition to Taiwan was initiated by, organized by, and calculated to serve the multiple purposes of the Japanese government, rather than simply the response to a request for protection from the Ryukyans as Tokyo generally portrayed it. It will be interesting to distinguish how many of Japan's mid- and late-20th century interactions with Taiwan may have been similarly internally motivated, rather than responses to outside (i.e. American) pressures.

By early March 1874 the first troop mobilizations for the expedition began. The operations plan called for only 800 soldiers, but 2,300 *laborers* to construct significant, permanent infrastructure (e.g. roads, bridges, etc.). Furthermore, on 4 April 1874 the Taiwan Aborigines Land Affairs Bureau (*Taiwan banchi jimū kyoku*) was established, headquartered in Nagasaki. General LeGendre was subsequently transferred from his post in the foreign office to the Taiwan affairs bureau. This so-called punitive expedition was appearing more and more like an outright colonization plan. In addition to General LeGendre, two other American navy officers (Lieutenant Commander Douglas Cassel, Lieutenant J.R. Wasson) and an American ship (the *New York*) were commissioned to directly participate in the expedition. The combined appearance of colonization plans and American participation drew harsh objections from Beijing, and criticism from Washington. In the end the *New York* sailed no farther than Nagasaki, and discussion of long-term colonization waned (though did not disappear).

The battles with the aborigines finished within three weeks (17 May – 4 June), but the Japanese troops, assisted by the large engineering teams of laborers, began entrenching. In the months to follow both China and Japan began preparations for a direct war against each other, which at times seemed inevitable. Neither side, however, actually wanted a war at that time.

Despite their resentment of what they perceived as Japanese interference in matters that were rightly Chinese concerns, overall the Chinese still sought friendly relations with Japan, especially in the face of continually encroaching Western imperialism, such as the French in Indochina. Furthermore, on the mainland, they were just finishing suppression of revolts in Yunnan and Kansu provinces, as well as deploying a large army in Xinjiang to pacify disturbances there. They did *not* want to fight Japan over Taiwan, lest they expose the vulnerabilities of their other border areas.¹³ For their part, while the Japanese were clearly not as concerned with maintaining friendly relations with China, they weren't ready for large-scale war, and they were increasingly concerned that this adventure was unduly disturbing relations with the Americans.

Finally, on 31 October 1874, both sides agreed to conclude the matter by signing the “Engagement Between Japan and China Respecting Formosa [Taiwan].” This agreement settled the matter of China’s complete jurisdiction over all of Taiwan by labeling Beijing responsible for the whole affair (resulting from the violence of Taiwanese aborigines). China thus agreed to pay what amounted to a war indemnity, but described as “compensation to the families” of murdered shipwrecked sailors (100,000 taels of silver) and “further payment” for future use of the permanent structures built by the Japanese expedition (400,000 taels). The Japanese agreed to a complete withdrawal of all troops by 20 December.¹⁴ Although the agreement did not make any direct mention of the status of the Liuqiu/Ryukyu Islands, it did explicitly recognize the validity of Japan’s right for the punitive expedition, which the Japanese subsequently chose to interpret as Chinese acknowledgement of Japan’s territorial claim. The Chinese vehemently disagreed, claiming that the unspecified “Japanese subjects” to whose families they had agreed to pay

¹³ Compare this to the absolute reverse today when Chinese scholars and officials exclaim that defending the territorial integrity of Taiwan (in the event of overt secession) is *critically essential* lest other border areas like Xinjiang inevitably follow suit!

¹⁴ The full text of this agreement is available at <http://www.taiwandocuments.org/1874treaty.htm>.

compensation were in fact merely four shipwrecked sailors from a Japanese ship from Oda Province of the Bitchû Prefecture, cast ashore on Taiwan on 8 March 1873. There has been much debate concerning this ambiguity.¹⁵ It is clear that the Chinese never intended the agreement on the Taiwan affair to have any bearing on the status of the Liuqiu/Ryukyu Islands. Whether the clever wording of the 1874 agreement was a premeditated Japanese attempt to establish a precedent for their claim on the Liuqiu/Ryukyu Islands, or was only a later reinterpretation, is difficult to discern. What is clear, however, is that the battles and near war over Taiwan was used as a means to clarify the nature of the newly forming relationship between China and Japan, and that the ambiguity of the initial settlement set the stage for Japan's subsequent outright annexation of the Liuqiu/Ryukyu Islands in April 1879.

II) The First Sino-Japanese War, 1894-95

On 1 August 1894 China and Japan declared war on each other essentially to settle the status of Korea as being either dominated by the Chinese or Japanese sphere of influence. The Kingdom of Korea was the last major state China imagined as a tributary, despite their defacto proclamation of complete sovereign independence in the Westphalian sense through numerous international treaty agreements, including the 1876 "Treaty of Kanghwa" with Japan. In the 1885 "Convention of Tiensin" (signed by Itô Hirobumi for Japan and Li Hung-chang for China)

¹⁵ The translation referenced in note 11 above, provided by the Taiwan Documents Project, differs markedly from others commonly accepted, and may be the result of differences between the original Chinese and Japanese versions. For example, the Taiwan Documents Project's version of Article 2 reads: "The Government of China will give a certain sum to compensate the families of the shipwrecked Japanese who were murdered [on Formosa]," whereas Liang Po-hua's translation from the Japanese original published in *Nihon gaikô bunsho* (Diplomatic Papers of Japan), volume 7, reads: "China shall pay consolation money to the families of the distressed (or shipwrecked) people who were injured on the former occasion..." The "former occasion" is of course entirely unspecified, and could be either of the 1871 or 1873 incidents. The Japanese sailors in the 1873 incident were not "murdered" as the Ryukyuan were in 1871, but were "distressed" and "injured." Liang's version favors the Chinese interpretation that the agreement did not reference the 1871 incident. The Taiwan Documents Project version favors the Japanese interpretation that it did.

the two rivals danced around the ambiguous status of Korea, agreeing to avoid immediate war by mutual removal of troops from Korea, and guarantees not to reintroduce any without adequate notification. When both sides sent troops into Korea in the late spring of 1894 it was ostensibly for the purposes of supporting the Korean government, but in reality attempts to secure a Korean government subservient to their own cause. One might have imagined that whatever conclusion was realized through the ensuing Sino-Japanese war would focus exclusively on that Korean region. In a maneuver entirely unforeseen at the outset of the war, however, the concluding “Treaty of Shimonoseki” ended up ceding Taiwan to Japan, in perpetuity. Once again, as in 1874, the unfolding of the Taiwan issue center stage in China-Japan relations was dictated by the combination of transitions in the global, multilateral framework, the pressures of domestic politics in Beijing and Tokyo, and the resulting congruities or incongruities between these local, regional, and global interests.

The decision to demand cession of Taiwan at the end of the Sino-Japanese war may appear to reveal a continuity of Japanese interest since 1874, but in fact, on the contrary, the entire war itself was the continuation of the interest in Korea, postponed since 1873. There is no evidence of any revival of colonization plans for Taiwan after the issue was abandoned in 1874. Such interests were revived only at the very end of the war for Korea, and only openly introduced in the very last stage of the treaty negotiations. It is a tragic irony that what was essentially an afterthought in this phase of China-Japan relations has remained to the present day the single greatest stumbling block in East Asian foreign relations.

Although Japan’s initial motivation for the Sino-Japanese war was limited to securing a dominant position vis-à-vis Korea, after their eventual victory became apparent they began maneuvering for direct acquisition of territories in China. After all, they couldn’t very well *take*

land from the Koreans, whose independence they were ostensibly defending, but victory in a major war certainly warranted some form of territorial gain. In October 1894 Foreign Minister Mutsu Munemitsu discussed this possibility for the first time in proposals sent to Premier Itô Hirobumi. He proposed three possibilities for concluding the war: 1) Chinese recognition of Korean independence, an indemnity (amount not specified), a commercial treaty in the same manner as those signed with European Powers, and cession of the Liaotung Peninsula (adjacent to Korea); 2) The same basic conditions of the first proposal, but with an additional international guarantee of Korean independence, and then the cession of Taiwan *instead* of Liaotung; or 3) Learning Chinese terms before disclosing any Japanese intentions. Mutsu said that acquiring Liaotung was only necessary and justifiable as protection against future Chinese interference in Korea; if an international guarantee protected against that, Taiwan should be taken instead.¹⁶

What's most notable about these proposals is that in October 1894, when victory was more or less assured, but neither the Japanese public nor the international community had yet given much thought to possible peace terms, Tokyo was only considering Liaotung *or* Taiwan, but never both as they would eventually demand. Ultimately public political pressure at home and concerns of outside pressures from Russia, Britain, France and Germany became the decisive factors that led to the final settlement.

China's historical hegemony in East Asia cast a long shadow, and material proof of Japan's transcendence over China elated and invigorated the Japanese public in ways even Mutsu and Itô couldn't have anticipated. Mutsu described the public mood in late 1894 as follows:

¹⁶ Edward I-te Chen, "Japan's Decision to Annex Taiwan: A Study of Ito-Mutsu Diplomacy," *The Journal of Asian Studies* 37, no. 1 (November 1977): 63. These proposals can be found in Mutsu Munemitsu, *Kenkenroku* (Diplomatic Memoirs of Mutsu Munemitsu), Tokyo: Iwanami Shoten, 1939, pp. 169-70. Mutsu's explanations to Itô are recorded in *Itô Hirobumi-den* (Biography of Itô Hirobumi), Tokyo: Shunzekô Tsuishōkai (Committee to Commemorate the Passing of Itô Hirobumi), 1943, III, pp. 143-4.

The public no longer has any doubt about the eventual victory. The only question that remains is: when will the flag of the Rising Sun fly in the sky of Peking? People are now completely immersed in the intoxicating mood of victory. Their appetite for Chinese territory grows larger every day...¹⁷

Simultaneously, as talk of Japan expanding the war into mainland China reached Western ears, the possibility of the heretofore-neutral Western powers intervening became an equally important factor for consideration. Itô and Mutsu had to develop a new strategy for the final stages of the war, and for the ensuing peace negotiations, that would both satisfy the Japanese public's thirst for territorial gain, and minimize the chances of undue foreign intervention. Their solution was what came to be known as Itô's "southern strategy" (*nampo senryaku*), officially called the "Strategy to Attack Weihaiwei and to Invade Taiwan." Itô first proposed this plan to an Imperial conference on the war on 4 December 1894. This was the first time that the possibility of acquiring Taiwan was discussed on that level, independent of linkage to the potential cession of Liaotung. This plan won great favor with the Imperial Navy (which feared an eventual Western seizing of Taiwan that could threaten Japan's southern perimeter), and restrained their Army rivals who were agitating for an expanded war in northern China. It was particularly supported by Saigo Tsugumichi (Minister of the Navy) and Kabayama Sukenori (Director of Naval Strategy), both of whom had directly led the Taiwan expedition of 1874.

Two and a half weeks later the value of Itô's southern strategy was confirmed when the Russians signaled their support. On 22 December the Russian Minister in Tokyo, Mikhail Hitrovo, said that Russia would "have no objection to Japan's occupying Taiwan," and proposed "to exchange ideas between Japan and Russia," so as to "prevent interference of any great Power" (apparently meaning England).¹⁸ China had made a plea to the Western powers for

¹⁷ Chen 1977: 64; Cited from Mutsu Munemitsu, *Kenkenroku* 1939, p. 145.

¹⁸ Chen 1977: 69; He cites this from Telegram #1165 sent to Ambassador Nishi Tokujiro in St. Petersburg from Foreign Minister Mutsu on the following day, 23 December 1894. A copy of this telegram is contained in *Nisshin*

intervention back in November, and although the Germans had clearly refused, the British French and Russians had not overtly ruled out such possibilities. With the Russians apparently onboard, Itô and Mutsu were well aware of the lingering possibility of other powers still intervening to protect their own interests in China. Thus when another Imperial conference was held in January 1895, Itô and Mutsu argued for excluding territorial concessions on the mainland. On 27 January, however, the insistence of the military for “legitimate” demands maintained the need for cession of Liaotung.¹⁹ Shortly thereafter, on 14 February 1895, Russian Minister Hitorov reiterated Russia’s acceptance of Japan taking Taiwan, but clarified their objection to annexing “any territory on the mainland of China” (i.e. Liaotung).²⁰ If Russia, or any other Western power were to intervene against the cession of Liaotung, Taiwan was now the only territorial concession Japan was likely to get. Given the demand for such concessions from the public, Taiwan now superseded the importance of the Korea region that was the actual initiative for the war itself. In a sense it was thus Western intervention that *caused* the Japanese demand for Taiwan, just as it would be Western intervention that would *cause* the prevention of China’s “recovery” of Taiwan in 1950.

As the war drew to a close and peace negotiations began in March 1895, Itô Hirobumi was the primary negotiator for Japan. Edward I-te Chen has made a very interesting observation about Itô’s perspective in entering these negotiations that is particularly relevant to my thesis that the restructuring of the regional order was instrumental in dictating China-Japan relations. Chen makes an insightful comparison to a similar restructuring of Germany’s position in the European community in the 1870s:

Kowa zengo ni okeru Kakkoku no Taido-Zakken (The Attitude of Western Powers before and after the Sino-Japanese peace negotiations—Miscellanea), I.

¹⁹ Frank W. Ikle, “The Triple Intervention: Japan’s Lesson in the Diplomacy of Imperialism,” *Monumenta Nipponica* 22, no. 1/2 (1967): 124.

²⁰ Chen 1977: 70.

For Itô, an ardent admirer of Bismarck, the victory had a special meaning. He hoped that it would result in the quick elevation of Japan's international position in the same way that Bismarck's victory over France in 1871 had brought glory and national unification to Germany. Just as he had patterned the Meiji Constitution after the Prussian model, Itô wanted to see all important features of the Treaty of Frankfurt included in the Treaty of Shimonoseki: territorial acquisition, a huge indemnity; occupation of an important enemy city until the full payment of the indemnity, and so forth. He must have felt that the 200-million-tael indemnity Japan obtained from China (far in excess of the actual cost of the war) was perfectly in line with the five billion francs Germany received from France, and that Japan was as much entitled to acquire Liaotung and Taiwan as Germany had been to annex Alsace and Lorraine.²¹ (Chen 1977: 71)

I will return to this comparison when we examine territorial changes in Germany and Japan's empires in 1919 (when Japan acquires German concessions in China and the Pacific) and in 1945 (when Japan eventually accepts the forfeiture of Taiwan).

The peace negotiations began in March 1895, but were critically disrupted when a Japanese would-be-assassin shot China's primary negotiator, Li Hung-chang. Itô made a gesture of goodwill and sympathy by accepting Li's previously denied request for a cease-fire during the negotiations. However, he deliberately excluded the Taiwan region from the "Armistice Convention," and the Japanese navy continued maneuvering into position to secure Taiwan. It was actually only at this point, at the final stage of the affair, that Taiwan (Formosa) was first directly mentioned to the Chinese. The Official Record of the Japanese Foreign Office records the following discussion between Itô and Li:

Itô: 'Incidentally, tell me what kind of people are the Formosans?'

Li: (Being surprised by the word 'Formosa', yet pretending to be calm) 'As Your Excellency knows, there are two kinds of people in Formosa: the mainlanders and the natives. Most of the mainlanders emigrated from the Province of Kwangtun. They are big and strong. The proportion between the mainlanders and the natives is about four to six. Now, was it because you were contemplating dispatch of troops to Formosa that you did not allow my request to include the area in the Armistice Convention?'

Itô: (Smiling) 'No, absolutely not.'

Li: 'Do you think Great Britain will remain silent if your country should occupy Formosa?'

Itô: 'There is no reason for Britain to intervene as she is a neutral country.'

²¹ Chen 1977: 71.

Li: 'Certainly, Great Britain is neutral in the war. But if matters affect her own interest...'

Itô: (Laughing) 'Well, the interests to be affected are yours not Britain's.'

Li: 'Not quite so, because Formosa is close to Hong Kong.'

Itô: 'True, but we will not attack anyone except our enemy.'

Li: 'I don't think Britain will be happy to see any country except China in possession of Formosa.'

Itô: (Smiling) 'Not only Formosa but any part of your territory if you want to cede it. I doubt any country would ever refuse to accept it.'²²

Now that the Japanese had finally tipped their hand to the Chinese, and the discussion of ceding Taiwan was introduced in earnest, the Chinese floundered with desperate last-minute attempts to deny Japan's ambitions.

At first the Chinese offered the British twenty years of guaranteed exclusive rights to develop Taiwan's mineral resources if they would accept the island as a temporary concession, thus preempting Japanese annexation. When this was refused China even suggested that they would be willing to *sell* Taiwan to a syndicate of British companies if they would be permitted to retain sovereignty of the island in name alone. Finally, when all else failed, the Chinese even attempted to sell the island to France. In the end, however, on 17 April 1895, China accepted the terms of the "Treaty of Shimonoseki" – Complete recognition of Korea's independence, an enormous indemnity, and the permanent cession of the Liaotung Peninsula, the Pescadore Islands, and Taiwan. Then as expected, less than a week later on 23 April, Germany, France, and Russia intervened to "request" that Japan forfeit the Liaotung Peninsula. Taiwan remained Japanese territory for the next half century.

²² F.Q. Quo, "British Diplomacy and the Cession of Formosa, 1894-95," *Modern Asian Studies* 2, no. 2 (1968): 142n3.

III) The Early Colonial Period, 1895-1912

Between the signing of the “Treaty of Shimonoseki” on 17 April 1895, and its ratification on 8 May, all parties (Beijing, Tokyo, and now even Taipei) made their final maneuvers to gain the best possible position in a situation none had really planned for. At the start of the Sino-Japanese war no one had predicted China’s quick and complete defeat, nor had anyone predicted that Taiwan might change hands as a result. China’s defeat signaled another shift in the regional power structure and left Japan to refocus its foreign policy concerns on the Western powers. Their takeover of Taiwan, and the momentary resistance from its residents, all developed according to this new power paradigm.

As early as the signing of the Treaty (17 April), the acting Governor of Taiwan (Tang ching-sung) and his compatriot the Acting Governor General at Nanking and Superintendent of Trade for the Southern Ports (Chang Chin-tung) began actively proposing “bribes” to various Western powers (e.g. Great Britain) whereby Taiwan would be “leased” independently of Beijing’s oversight, thus countering Japan’s claim. Their ambitions were only strengthened when the parties of the Triple Intervention objected to Japan’s seizure of Liaotung, theoretically opening the door for a similar retrocession of Taiwan. Whereas Li Hung-chang in Beijing might have been inspired to similar ambitions, he instead had the exact opposite reaction; Li feared that instigating an incident over Taiwan might provide the Japanese with an excuse to refuse returning Liaotung, or maybe even resume hostilities. Instead of respecting Li’s wishes, on 25 May 1895 Tang declared Taiwan an autonomous republic.

It is worth briefly noting the exact manner in which Tang elected to describe and define the Taiwan Republic (and Japan’s responses), since in the post-WWII period similar subtleties in describing Taiwan’s “independence” became critical sticking points in China-Japan relations,

and similarly influenced the options for Japanese response. Governor (and then President) Tang had seen how Japan's adoption of constitutionalism in 1889 had helped earn them respect from the Western powers.²³ It was hoped that establishing a constitutional republic on Taiwan, in danger of being conquered by an aggressive Asian neighbor, might inspire sympathy from one of the Western powers. Although this strategy worked for the Republic of China on Taiwan in 1950²⁴, in 1895 the Western powers had already consigned Taiwan to its Japanese fate. Tang had to undertake this action independently of Li Hung-chang's objections, lest it provoke Japanese retaliation against Beijing. However, he could only retain political credibility on Taiwan if he represented this as being in the service of China's interests.²⁵ Thus rather than describing the new republic as "independent" (*tu-li*, as for example Korea was now described in Article 1 of the "Treaty of Shimonoseki"), he used the term "self-dependent" (*tzu-li*).²⁶ As a self-dependent, autonomous entity, the Taiwan Republic had not permanently broken from the Empire of China, but could now act according to the supposed will of the people in its (and theoretically China's) best interest. Japan, however, could not recognize Tang's republic in any way, and could only respond with force.

The Taiwan Republic would not admit Beijing's representative, Li Ching-fong, who subsequently had to carry out the Treaty-stipulated transfer of Taiwan's sovereignty to Japan aboard a Japanese warship. On paper Japan acquired Taiwan from China by treaty agreement, but in practice Japan had to conquer the Taiwan Republic in order to realize its claim. Four days

²³ Ironically, Japan's entry into the "Imperialist Club" with the acquisition of Taiwan might have earned them even greater respect.

²⁴ When the U.S. directly intervened to prevent conquest by the People's Republic of China on the mainland.

²⁵ Compare this to how Chiang Kai-shek's government in Taipei could only retain political credibility among its supporters by maintaining the claim of rightful leadership for *all of China*, at least for the first decades on Taiwan.

²⁶ See for example Tang's usage in his version of the establishment of the republic, found in *Ch'ing Kuang-hsü ch'ao chung-Jih chiao-she shih-liao* (Historical sources of the Sino-Japanese negotiations during the Kuang-hsü reign of the Ch'ing Dynasty) (Taipei, 1963, reprint), vol. 2, p. 871, doc. 3259; Cited in Harry J. Lamley, "The 1895 Taiwan Republic: A Significant Episode in Modern Chinese History," *The Journal of Asian Studies* 27, no. 4 (August 1968): 752.

after the Republic was declared Japanese troops began landing in northern Taiwan. Eight days after that President Tang fled to the mainland. Despite the rapid collapse of the fledgling government in Taipei, it took until 18 November for the Japanese military to finish securing the last Taiwanese city in the south (Tianan), and a full four more years to suppress continued guerilla resistance.

In those first few years of colonial rule Tokyo lacked any consistent or meaningful plan for what exactly to do with its new prize, or how to go about it. It was the second Governor General, General Katsura Tarô (r. June 1896 – October 1896) who first realized that any policy for Taiwan needed to be fundamentally linked with a China policy, and situated within the parameters of Japan's regional and global foreign policies (as it would remain even into the present day). In his words:

If we want to frame a policy for managing Taiwan, we must formulate a policy toward China. This requires devising a policy for managing south China, and to accomplish that, we must manage the harbor of Amoy and Fukien. If we intend to do these things, we must ultimately consider a policy that relates to South-East Asia.²⁷

Before he could organize Taiwan colonial policy accordingly, however, he was returned to Japan to become vice-minister and then Minister of War. Katsura's subsequent political career tracked precisely with exactly this shift towards imperial expansion,²⁸ and from his later post as Prime Minister he kept Taiwan policy focused along such lines.

Perhaps taking his cue from Minister of War Katsura, the fourth Governor General of Taiwan, Kodama Gentarô (r. 1898-1906), explicitly defined the purposes of colonial policy for

²⁷ Tokutomi Ichirô, ed. *Kôshaku Katsura Tarô Den* (Biography of Prince Katsura Tarô) (Tokyo: Katsura Kôshaku Kien Jigyô Kai, 1917), p. 706; Cited in Chang Han-Yu & Ramon H. Myers, "Japanese Colonial Development Policy in Taiwan, 1895-1906: A Case of Bureaucratic Entrepreneurship," *The Journal of Asian Studies* 22, no. 4 (August 1963): 434.

²⁸ Katsura became Prime Minister in 1901 and oversaw the next critical stage of Japan's imperial expansion: He organized the Alliance with Great Britain in 1902; oversaw the defeat of Russia in the Russo-Japanese war of 1904-5, resulting in among other gains the acquisition of the Liaotung peninsula denied back in 1895; secretly signed the Taft-Katsura Agreement with the U.S., whereby the two recognized each other's paramount spheres of influence in Korea and the Philippines, respectively; and oversaw the full colonial annexation of Korea in 1910.

Taiwan in terms of preparation for expanding dominance in East Asia, and standing up to the inevitable resistance (and war) from their competing Western powers.

In recent years, the European powers have expanded their influence in Asia. How should we meet this threat?...In order for us to acquire the power to oppose them so that we can continue to dominate in the Far East and preserve the peace, there is no other recourse open to us but to acquire more knowledge and increase our wealth...When Western countries war with one another...only those which are materially strong and can sustain a heavy military burden for a long period of time will win...Today's most urgent task is to develop the resources of Taiwan...this will enable us to keep pace with the progress of other countries in the world. Japan will then be on an equal footing with the European powers...²⁹

Japanese colonial policy for Taiwan developed more or less consistently with this perspective.

Furthermore, it will be precisely this conception of Taiwan's importance for Japan that will eventually lead to the decision to strip Japan of this colony (and all others) at the end of WWII.

IV) The Latter Colonial Period, 1912-1943

The Qing government in Beijing had let Taiwan go, and during those last 15 years or so of their crumbling rule, there is little evidence that they ever seriously considered possibilities for its return. For Japan's part, after the conclusion of the Russo-Japanese war the majority of their colonial efforts were focused to the north in Korea and Manchuria. Itô's old "southern strategy" so favored by the navy was replaced with the army's emphasis (bordering on obsession) with the "Russian threat" and slowly blossoming ambitions vis-à-vis northern China. In the early years of the Republic of China, Japan further displayed its designs on China with the 21-Demands. By the time WWI finished China was requesting recovery of German concessions, only to bitterly endure them being transferred to Japan. The idea of recovering Taiwan never even occurred. It was with this mindset that both Mao Zedong's Chinese Communist Party and Chiang Kai-shek's ruling Nationalist Party considered Taiwan throughout most of the following decades. Despite

²⁹ Kodama said this at a conference of island administrators in 1900. Mochiji Rokusaburô, ed., *Taiwan shokumin seisaku* (Taiwan Colonial Policy) (Tokyo: Fuzambo, 1912), pp.172-3; Cited in Chang 1963: 436.

present day exhortations to the contrary, there is little evidence of serious consideration of Taiwan's possible return prior to the Cairo Conference of 1943. In order to understand how Taiwan could resurface and once again become the central point of China-Japan relations during the post-WWII years, we need to briefly examine how Japanese colonization of Taiwan was understood leading up to that point.

There were two aspects to the question of "recovering" Taiwan – was it "recoverable," and given the ambiguities of Taiwan's former status under the now defunct Qing Empire, how exactly should "recovery" be construed. As for the first concern, prior to 1943 Taiwan was generally not considered "recoverable." In the 1920s and 1930s, the status of the Japanese Empire in East Asia seemed very secure. Certainly Chinese patriots could envision repelling Japanese incursions south of the Great Wall, and maybe even from Manchuria, but there was little hope of anything more. After Japan expanded their war in December 1941 such potentials arose, but weren't often spoken of until the tide had truly turned in 1943. The utter infeasibility of recovering Taiwan could explain a great deal about why it generally wasn't discussed, in any terms. To whatever degree this may be relevant, it should be kept in the back of our minds when attempting to analyze the thinking behind those limited discussions that did occur.

The second question of Taiwan's potential future status is far more interesting. Many present day discussions speak of Taiwan's "return" to "China" as a given, without qualification. However, Taiwan was ceded to Japan in 1895, and thus was never actually a part of the Republic of China, founded in 1912. Nor was it ever actually a part of the People's Republic of China, founded in 1949. Mentioning this point today would inevitably lead to discussion of how "the territorial rights of a country do not change with a change in ruling government," etc. Prior to

1943, however, both the ruling Nationalist Party and the soon-to-be ruling Communist Party discussed Taiwan as something separate, and *not* as “lost” sovereign territory.

A first point of evidence to consider is the language used by the Chinese Communist Party (CCP) to discuss Taiwan and Taiwanese. At their sixth National Congress in 1928 the CCP recognized the Taiwanese as ethnically separate from Han Chinese, referring to them as a distinct “nationality,” “race” (*zhongzu*), or “stock” (*zongzu*).³⁰ This status as a “minority nationality” was extended in the “Draft Constitution of the China Soviet Republic,” adopted by the First All-China Soviet Congress on 7 November 1931 – “Han, Manchu, Mongol, Mohammedan, Tibetan, Miao, Li and also the Taiwanese, Koreans, and Annamese *who reside in China*, are equal under the laws of Soviet China [emphasis added].”³¹ This wording thus not only separated the Taiwanese from the Han, but also further grouped them with the Koreans and Annamese as having a homeland separate from China.

This position was also supported by other official proclamations concerning Taiwan. For example, among the seventeen “general goals of the present mass movement” identified in the 1928 Central Committee Notice, Shantung and Manchuria were identified as territories to be recovered from Japan, but Taiwan was noticeably excluded.³² In Mao Zedong’s 1934 “Report to the China Soviet Republic Central Executive Committee and the People’s Committee to the Second All-China Soviet Congress” he “not only reaffirmed the Chinese Communist position that Taiwanese residing outside Taiwan and in China were a ‘minority nationality,’ but also

³⁰ CCP Sixth National Congress, “Dahui Tongguo zhi Ke Xiao Jueyi-an” (Various Minor Resolutions Passed by the Congress), July 1928, in *Chûgoku Kyosantôshi Shiriyoshu* (*Collection of Chinese Communist Party Historical Materials*), edited by Nihon Kokusai Mondai Kenkyujo Chûgoku Bukai (China Section, Japan Institute of International Problems), Keiso Shobo, 4 vols, 1971-5. Cited in Frank S.T. Hsiao & Lawrence R. Sullivan, “The Chinese Communist Party and the Status of Taiwan, 1928-43,” *Pacific Affairs* 52, no. 3 (Autumn 1979): 447.

³¹ Hsiao 1979: 448.

³² *Zhongyang tongkao*, No. 54, July 1928, “On the Current Situation,” in Hyobom Park, ed. *Documents of the Chinese Communist Party, 1927-1930* (Hong Kong: Union Research Institute, 1971), p. 454; Cited in Hsiao 1979: 448.

implied CCP recognition and support of an independent Taiwan national liberation movement” aimed at “the establishment of an independent state similar to other Japanese colonies, such as Korea.”³³ He reiterated the same position again in 1936 when he said:

It is the immediate task of China to regain all our lost territories, not merely to defend our sovereignty below the Great Wall. This means that Manchuria must be regained. We do not, however, include Korea, formerly a Chinese colony, but when we have re-established the independence of the lost territories of China, and if the Korean wish to break away from the chains of Japanese imperialism, we will extend them our enthusiastic help in their struggle for independence. The same thing applies for Formosa.³⁴

Two years later, in 1938, Mao again distinguished Taiwan and the Taiwanese struggle against Japanese imperialism as a fundamentally separate national cause:

The war of aggression committed by Japanese Imperialism not only endangers the Chinese nation, it also endangers all of the Japanese soldiers and people, and also the oppressed nationalities of Korea, Taiwan, etc. In order to defeat Japan’s war of aggression, the soldiers and people of the two great nations of China and Japan, and also the oppressed nations of Korea, Taiwan, etc., should join in efforts broadly and persistently to establish a mutual united front of anti-aggression.³⁵

The perspective that underlay this position was the internationalist orientation of the Chinese communists, as part of a global revolutionary effort. This can perhaps best be seen in Zhou Enlai’s precise inclusion of the Taiwanese anti-Japanese movement as part of the global anti-colonial national liberation struggles:

...since we opposed aggression from other nations, we should sympathize with independence-liberation movements (*duli jiefang yudong*) of other nation-states (*minzu guojia*). We will not only assist the anti-Japanese movements of Korea or Taiwan, or anti-German, anti-Italian aggression movements of the Balkan and African nations, but also sympathize with the national liberation movements of India and various South Asian

³³ Ibid. 449.

³⁴ This was a personal statement made to Edgar Snow on 16 July 1936. Edgar Snow, *Red Star Over China* (New York: Random House, 1948), pp. 88-9; Also quoted in Hsiao 1979: 453-4.

³⁵ *Lun Xin Jieduan, Mao T’sse-tung Xuanji (On New Stages, Selected Works of Mao Tse-tung)* (Jiefang She, 1944), p. 54; Cited in Hsiao 1979: 451.

countries—we will never sacrifice the benefit of national liberation of the oppressed nationalities, and serve the benefit of imperialism.³⁶

Far from being an argument for any sort of “recovery” of Taiwan, this is an argument for Taiwanese independence. The CCP maintained much of this basic perspective on national liberation movements into the post-WWII years, but after the Cairo Conference of 1943 they never spoke of Taiwan in such terms again. After the Cairo Conference set the stage for Taiwan’s (re)incorporation into mainland China, the combination of the rapidly changing regional and international order with the transformation of the CCP’s dominant domestic political ideology from an internationalist to a nationalist orientation, created an entirely new paradigm for (re)locating Taiwan in the center of China-Japan relations.

V) Taiwan’s “Recovery” from Japan, 1943-1950

On 27 November 1943, Franklin Roosevelt, Winston Churchill, and Chiang Kai-shek together signed the Cairo Declaration (“Declaration of the Three Powers – Great Britain, the United States and China Regarding Japan”). When Li Hung-chang signed the “Treaty of Shimonoseki” in 1895, as an official representative of the Chinese government, China legally accepted the cession of Taiwan to Japan, just as countless other territories had changed ownership through war and treaty in countless other times and places.³⁷ Furthermore, as we have already seen, this agreement unfolded in extensive consultation with all of the other major states active in the region, including Great Britain and the United States, who approved of and

³⁶ From Zhou Enlai’s June 1941 paper, “National Supremacy and State Supremacy,” available in *Chūgoku Kyosantōshi Shiryōshū (Collection of Chinese Communist Historical Materials)*, vol. 10, p. 443; Cited in Hsiao 1979: 453.

³⁷ For example, consider the Chinese cession of Hong Kong to the British in the “Treaty of Nanjing” (29 August 1842), naturally to be re-occupied by the British after expelling the Japanese; or the Spanish cession of the Philippines (and also Puerto Rico and Guam) to the United States in the “Treaty of Paris of 1898” (10 December 1898), naturally to be re-occupied by the Americans after expelling the Japanese; or even closer to home, the Mexican cession of territory including California, Nevada, Utah, Wyoming, Arizona, New Mexico, and Colorado to the United States in the “Treaty of Guadalupe Hidalgo” (2 February 1848).

acknowledged this transfer.³⁸ In the Cairo Declaration, however, Japan was now labeled the “brutal enemy,” and Taiwan (Formosa) was labeled one of the “territories Japan has *stolen* from the Chinese” (emphasis added).³⁹ Had the legality of the treaty that concluded the first Sino-Japanese war been respected, Taiwan could easily have been transferred directly back to China in exactly the same manner through a treaty concluding this second Sino-Japanese war. Instead, as an ideological construct re-defining Japan’s current aggressions as part of a half-century agenda, the Cairo Declaration re-wrote the history of Taiwan in such a manner that the language of “returning stolen territory” completely superseded the quickly forgotten language of Taiwan’s “independent minority nationality” used by the CCP throughout the 1920s and 1930s, or the language of Taiwan’s “self-dependent autonomy” used by the 1895 Taiwan Republic.⁴⁰

Through the Cairo Conference, Taiwan re-emerged as a central point for defining China-Japan relations within the evolving context of the Allied powers’ plan for reconfiguring the entire post-war regional and world orders. Less than a month later, Maxwell Stewart published an assessment of the Cairo Declaration in *Far Eastern Survey* that clearly indicated the American perspective on this process –

On the positive side should also be listed the conference’s decisions with respect to the dismemberment of the Japanese Empire. As the most highly industrialized nation in Asia, Japan will undoubtedly make another bid for dominance of Asia if she has the power to do so. But the basis of Japan’s strength, both economic and military, is to be found in her ill-gotten empire. Once that is gone, the task of holding Japanese militarism in check by

³⁸ In a sense, Russia, Germany and France’s intervention against cession of Liaotung, but not Taiwan (even when the fledgling “Taiwan Republic” was petitioning for it), can be considered reiteration of their condoning Taiwan’s legal transfer.

³⁹ The text of the Cairo Declaration is available at the Government of Japan, National Diet Library web-document <http://www.ndl.go.jp/constitution/e/etc/c03.html>.

⁴⁰ It is interesting to note that the half-century of Japanese “ownership” of Taiwan bore little weight in the 1943 considerations. Compare this to the fact that by 1943 Taiwan had been a part of Japan for about as long as a full ten states had been part of the United State’s current 48. (Arizona, New Mexico – 1912; Oklahoma – 1907; Utah – 1896; Wyoming, Idaho – 1890; Washington, Montana, North Dakota, South Dakota – 1889). I note this here because as Taiwan remains separated from mainland China into the 21st century, 111 years after cession to Japan, the issue of duration *has* become a factor considered among some analysts, along side continued references to the Cairo Declaration.

collective security measures should be reduced to manageable proportions.⁴¹ (Stewart 1943: 241)

The 1895 acquisition of Taiwan, which had gained Japan so much respect and approval by the established members of the “Imperialist Club,” was now simply a part of her “ill-gotten empire”; a part that needed to be excised in order to guard against the “undoubted” re-bid for dominance inevitable from such as the Japanese. Furthermore, as for China’s position in this new equation:

The Cairo Conference must also be given credit for both realism and a high sense of justice in making it possible for China to become the leading power in Asia after the war. Few would question China’s right to Manchuria, Formosa [Taiwan], and the Pescadores. But from the standpoint of postwar security in the Pacific, it is likewise important that a strong, united China be created which will be fully capable of offsetting any future threat from Japan. While the restoration of China’s lost territories is not enough in itself to assure either the unity or strength of postwar China, the action removes the major foreign-imposed shackles and places the responsibility for China’s future squarely on Chinese leadership.”⁴²

Just a few years later, however, the American perspective reversed. In the words of President Truman, concerning his decision of 27 June 1950 to deploy the U.S. 7th Fleet to intervene in the Taiwan Strait, with regard to the “standpoint of postwar security in the Pacific” mentioned above, “The action of the United States in regard to Formosa...[was] designed to keep the peace...” Furthermore, rather than the simple “return” of Taiwan to China promised by the “Cairo Declaration,” Truman continued, saying, “The actual status of the island is that it is territory taken from Japan by the victory of the Allied forces in the Pacific. Like other such territories, its legal status cannot be fixed until there is international action to determine its future.”⁴³ Rather than stripping Taiwan from Japan to preempt a Japanese threat, by 1950 it had become

⁴¹ Maxwell Stewart, “The Cairo Declaration,” *Far Eastern Survey* 12, no. 25 (December 22, 1943): 241.

⁴² *Ibid.*

⁴³ Letter from President Truman to Ambassador Warren Austin, 27 August 1950, on file as part of the Papers of Harry S. Truman: President’s Secretary’s Files, available in the Truman Presidential Museum & Library. A digital scan of the original letter can be accessed through the Truman Library’s web-document collection at http://www.trumanlibrary.org/whistlestop/study_collections/korea/large/sec3/mac_6_1.htm.

preventing the return of Taiwan to the government in Beijing and *strengthening* the disposition of Japan, to safeguard against any future threat from China.⁴⁴

Conclusion

When China and Japan first began renegotiating their modern relationship in 1870, one of the most immediate matters to settle was their respective relationships with their mutually peripheral territories – Korea, the Liuqiu/Ryukyu Islands, and Taiwan. These disputes over “middle ground” were originally born of geography, but quickly became matters of diplomacy and politics. As such, these issues became defining points of interaction in the evolution of China-Japan relations. Taiwan remained at the center of this ongoing process over the following eighty years. By 1950 the Cold War defined a new geography for East Asia whereby Taiwan once again straddled the center line; this time it was a line dividing the Eastern bloc from the Western bloc, and extended from the thirty-eighth parallel in Korea, through Taiwan, and across the center of a fracturing Vietnam. It is impossible to understand the evolution of China and Japan’s modern relationship without appreciating the consistent centrality of Taiwan and Taiwan issues in this process.

Furthermore, one cannot truly understand this role that Taiwan has played in China-Japan relations without recognizing the consistent core dynamics that have shaped the process. First, most of the key moments of transition concerning Taiwan were directly shaped by, and often dominated by, concurrent transformations of the global or regional inter-state order. Whether it was the transition from the “Chinese world order” to the “Westphalian system,” or the creation

⁴⁴ In July 1950, according to the direct dictates of the United States occupation authority, Japan began remilitarization with the creation of the National Police Reserve, transformed over the next few years into the formidable National Self Defense Forces.

of the Cold War order eight decades later, the nature of Japan's disputes with China about Taiwan were consistently framed within these broader contexts.

At the same time, however, once these broader issues determined the nature of the game, the details of its play were consistently dominated by matters of domestic politics rather than the demands of foreign relations. While it's always the case that domestic politics set the parameters for a government's foreign relations, as we've seen when it comes to dealing with Taiwan, the domestic concerns of Tokyo and Beijing have played a significantly disproportionate role.

Finally, the relationship between these external and internal factors has consistently determined the magnitude of the resultant transitions in China-Japan relations. When the dictates of domestic politics have been congruent with the pressures set by changes in the regional order, Taiwan issues have led to major diplomatic shifts, e.g. 1895. When the debates of domestic politics have been incongruent with matters of international relations, e.g. Republican China in the early 1930s, Taiwan issues played proportionally smaller roles in China-Japan interaction.

Although a continuation of this kind of analysis from 1950 through 2007 will be necessary to develop this thesis fully, this analytical survey of the first eighty years of China-Japan relations has clearly demonstrated that the centrality of Taiwan and Taiwan issues demands far more attention than the existing scholarship has given.