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Public diplomacy as a contributing factor to managing identity-based conflict: Taiwan repositions its identity and security status (2000-2020)

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Citation

Lin, Y. (2025, December 2). *Public diplomacy as a contributing factor to managing identity-based conflict: Taiwan repositions its identity and security status (2000-2020)*. Retrieved from <https://hdl.handle.net/1887/4284142>

Version: Publisher's Version

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Note: To cite this publication please use the final published version (if applicable).

Chapter 5. Research Design and Methodology

5.1 Introduction

This chapter provides a detailed description of the research design and methodology used for this dissertation. The central research question invites a qualitative analysis of the relationship between Taiwan's foreign relations narrative and its use of public diplomacy as a conflict resolution strategy. As discussed in the previous chapter, there have been abundant empirical studies on China's soft power and conflict resolution, but Taiwan's case has been limited in examination or often taken as a minor case in China studies. Therefore, the data gathered prioritizes a focus on Taiwan to enrich Taiwan's case within the fields of identity formation, security, conflict resolution, and public diplomacy. The research design relies on two complementary sources of data: (1) document analysis of Taiwan's Ministry of Foreign Affairs annual policy reports (台灣外交年鑑) from 2000–2020, and (2) 18 semi-structured interviews with Taiwanese citizens who expatriated to China, Vietnam, Thailand, Singapore, and Malaysia. To operationalize the concepts of peace and conflict derived from the literature review chapters, I developed a spectrum that incorporates historical and cultural dimensions in the coding process. This spectrum, introduced in section 5.4.1, displays the term lists used in the document analysis and supports the investigation of Taiwan's evolving conceptualization of conflict, security, and public diplomacy. The following sections are divided into: (1) research design: qualitative research, (2) data collection, (3) operationalization of key concepts, and (4) summary.

5.2 Research Design: Qualitative Research

To address the central research question, this dissertation adopts a qualitative research design. A qualitative approach is appropriate because the focus is not on measuring causal effects but on examining how identity, security, and public diplomacy are interpreted and practiced across different contexts. Alternative approaches such as comparative case studies (Mills et al. 2010), survey research (Julien 2008), or process tracing (Beach and Pedersen 2019) could measure effectiveness, identify general trends, or explore causality. However, the aim of this dissertation is to capture the evolving and nuanced meanings of Taiwan's identity and security within its conflict with China.

For this purpose, a qualitative design provides the necessary interpretive and context-sensitive tools.

Qualitative research is an interpretive and naturalistic approach to the world, which refers to studying the natural settings to interpret the phenomena in terms of the meanings that people assign to them (Denzin and Lincoln 2011). Qualitative methods are used to elaborate on the interpretations of themes, focusing on presenting the logic of how these themes are interpreted and connected (Graneheim et al. 2017). While qualitative research was for some time treated as an alternative to quantitative research, it has evolved and developed various approaches that should no longer restrict the definition but focus on its features (Flick 2018). For example, interpreting data can be derived from the research field notes and transcription of the interviews, which the researcher conducted in the setting of studying people's observations and perceptions. The analysis results provide a more comprehensive understanding of respondents' lives than is obtained by inviting them to complete a survey about everyday events (Bailey 2018). If the goal is to measure the effectiveness of public diplomacy strategies in solving the identity-based conflict, the methods can be comparative case studies, survey research, or process tracing.

Several research projects have employed qualitative descriptive analysis to delve into the conceptualization of conflict resolution and public diplomacy. For instance, Darnton (2020) investigated the relationship between public diplomacy and international conflict resolution in Cold War-era South America through descriptive analysis of archived evidence, such as the Argentine Ambassador's speeches and interaction events involving Brazil. Similarly, Storie (2015) conducted focus group interviews with young females in the United Arab Emirates, revealing the necessity of incorporating cultural values and local languages into public diplomacy messages, despite English's global prevalence. Storie (2017) also highlighted the challenges of interviewing public affairs officers due to their cautiousness in sharing information, suggesting that exploring the local political context could supplement interview limitations. Conducting interviews has been central to more recent studies. Arai (2023) investigated Taiwanese social memory through interviews on individual perceptions of historical conflict with China. Ayhan and Jang (2022) interviewed ten South Korean participants and supplemented their findings with interviews with bureaucrats and

policy documents to examine the impact of people-to-people diplomacy on identity, underscoring the enhanced validity achieved through combining policy documents and interviews. Building on these studies, I apply both content and thematic analysis to examine how state narratives and societal experiences together shape Taiwan's public diplomacy.

Two qualitative methods are employed: content analysis of policy documents and thematic analysis of semi-structured interviews. These methods are selected to address the research aim of examining how Taiwan's public diplomacy intersects with identity formation and security concerns. Content analysis is used for addressing social problems or policies affecting individuals or groups (Drisko and Maschi 2015). Here, I apply content analysis to Taiwan's annual diplomatic policy reports (2000 – 2020) to uncover evolving patterns, themes, and narratives. Particularly, these annual policy reports feature a longitudinal nature that enables the examination of evolution and development over time (Krippendorff 2004). To enhance transparency and conceptual clarity, the analysis produced conceptual maps and thematic categories (Elo and Kyngäs 2008), aided by the open-source software system, DocuSky, as specified later in this chapter. While individuals' motivations can be multifaceted, thematic analysis serves as a valuable model for interview data (Emmons and King 2009). Thematic analysis is used to examine interview data, which allows a richer description and interpretation of individual perspectives and often results in the creation of thematic maps (Vaismoradi et al. 2013). Semi-structured interviews are particularly suitable for capturing lived experiences and the ways individuals perceive Taiwan's diplomatic practices, identity, and security.

The data set combines these two perspectives: 21 annual diplomatic policy reports from Taiwan's Ministry of Foreign Affairs, and 18 semi-structured interviews with Taiwanese expatriates conducted between 2022 and 2023. The reports reflect the state's official narrative of shifting diplomatic priorities, while the interviews capture societal perspectives, thereby bridging the gap between governmental strategy and civil society perceptions. To ground the analysis in concrete developments, the interviews focused on three focal cases: The South China Sea dispute, the ECFA, and the COVID-19 pandemic. These cases were selected because they represent critical moments in which Taiwan's identity, sovereignty, and security were tested, and they correspond with

shifts in Taiwan's public diplomacy strategy. Examining these moments through both state documents and individual experiences provides a grounded understanding of how Taiwan's public diplomacy has been conceptualized as a conflict resolution tool in the 2000–2020 period.

5.3 Data Collection

The data collection process encompasses sampling procedures and stages for gathering two types of data: policy documents and semi-structured interviews. For the policy documents, this section elucidates the rationale behind selecting these data sources, the methodology employed for data retrieval, and the languages utilized in interpreting the documents. For the semi-structured interviews, this section explains the process of respondent recruitment, ethical considerations about obtaining interview consent, and the languages utilized during the interviews.

5.3.1 Data Collection: Policy Document

This section explains the data collection of the policy documents in the following order: first, the sampling process of the policy documents; second, the stages of collecting these documents; at last, the concern of languages.

Taiwan's Ministry of Foreign Affairs has annually released reports on diplomatic work since 1997, archived on the official website (<https://www.mofa.gov.tw/News.aspx?n=245&sms=109>). For this dissertation, twenty-one annual diplomatic policy reports spanning from 2000 to 2020 were collected. To evaluate the relationship between security, conflict resolution, and public diplomacy, the data sections selected from the reports were the chapters of (a) a summary of Asia-Pacific relations, and (b) a summary of public diplomacy implementation.

The annual reports from Taiwan's Ministry of Foreign Affairs provide comprehensive descriptions of diplomatic administration, relations with other states, diplomatic approaches, and challenges to Taiwan's diplomatic status. These reports, openly accessible on the Ministry of Foreign Affairs website, were downloaded and processed into text files for analysis. Only text-based data was used for analysis, excluding image files such as jpg or png.

All 21 annual diplomatic reports are written exclusively in traditional Mandarin and are not officially translated into other languages. This linguistic and open accessibility suggests that their primary audience is the domestic Taiwanese public, rather than international readers. In this context, these reports are not just bureaucratic records but serve a domestic communicative function, reinforcing state identity narratives and national purpose. Some terms within the reports were translated into English by the researcher for academic purposes, such as 台灣書院 translated to “Taiwan Library,” 青年打工度假 translated to “Youth Mobility Scheme,” and 外交小尖兵 translated to “Teen Diplomatic Envoys.” However, major policy terms such as 新南向政策 New Southbound Policy were retained in Mandarin, as they are commonly used and understood in mainstream media without translation.

5.3.2 Data Collection: Semi-structured Interviews

This section explains the data collection of semi-structured interviews in the following order: first, the sampling of the respondents; second, the ethical considerations of conducting the interviews; third, the stages of collecting the interviews; and lastly, the concern of languages in these interviews.

The recruitment of respondents began with multiple entry points, namely, the researcher’s professional and academic networks in Taiwan, the United Kingdom, and the Netherlands. From this initial pool, respondents were identified who had expatriate experiences in China, Vietnam, Thailand, Singapore, and Malaysia. These individuals came from diverse backgrounds, including academia, business, government authorities, and NGOs. The key selection criterion was that respondents had lived or worked in relation to the historical conflictual events discussed in *Chapter 2*: the South China Sea dispute, the ECFA, and the COVID-19 pandemic. To expand the respondent pool while retaining relevance to these thematic concerns, snowball sampling was employed. Initial contacts recommended others whose expatriate experiences were aligned with the focus of this dissertation. Although the snowball method carries the risk of reproducing similar demographic profiles or perspectives, this limitation was mitigated by beginning with a deliberately diverse initial sample and balancing regional experiences between China and Southeast Asia. More interviews were eventually conducted with Southeast Asia-based individuals due to availability and relevance, but

the strategy ensured a broader diversity than would have resulted from a single network or professional cohort.

In total, 18 interviews were conducted. Sixteen were carried out through online meeting platforms. These respondents resided outside of Taiwan and had limited availability due to professional responsibilities, which involved frequent travel between Taiwan and their respective countries of expatriation, making in-person interviews logistically difficult. Two respondents, however, were interviewed in person in Taiwan, as they had recently concluded their expatriate duties and were available for face-to-face interviews. All respondents have given their consent to participate in interviews under the condition of confidentiality. The consent process was explained to respondents before the interview throughout the consent form, which can be found in Appendix I, to ensure respondents the protection of their data, the interview format, and the questionnaire. The recording of 16 interviews was consented with the respondents and transcribed, while two interviews were not recorded due to respondents' concerns and thus were considered as key informant interviews. To ensure privacy protection, all recordings and transcriptions were not shared in the public archive but only in the researcher's private drive. The recordings were all deleted after being transcribed into texts without the possibility of tracing them back to the respondents.

The interviews were conducted in three stages: first, profiling the respondents' wish to engage with which historical conflictual event; second, recording by audio the respondents' interviews sharing their stories of experiencing these historical events, their observations of the environment in the country they expatriated to, and their views of the impact of these events on their life; at last, the respondents received the preliminary analysis result of their interviews and confirmed or supplemented anything to their own story, in which the recording was also deleted after the result of the transcription. These three stages were from December 2022 to June 2023. The first stage was not recorded by audio, but was interviewed within 15 minutes. The second stage was recorded by audio, and 16 interviews ranged from 78 minutes to 126 minutes, while two interviews were not recorded due to respondents' concerns. The third stage was not recorded by audio but shared in texts by respondents.

All respondents were coded in two alphabetical symbols and one digital number. The first alphabetical symbol is respectively for three different chosen historical conflictual events A, B, and C. The second alphabetical symbol is referred to if the respondent has chosen to share experiences with the other event; namely, the code X is that the respondent has shared experiences with all three events whereas code E is that the respondent has only shared experiences with one event. The digital number is the sequence of the interviews conducted. Hence, the respondent coded with AX1 refers to the interview content started from event A to the other two events and is the first in the sequence of event A to be interviewed.

The interviews were conducted in Mandarin, Taiwanese, or English suited to the respondents' linguistic environment accordingly to ensure that the respondents could use their own words in their cultural understanding to share their experiences and observations. 15 interviews were mixed in Mandarin, Taiwanese, and English. two interviews were only in Mandarin and Taiwanese while one was only in Mandarin and English. The transcription was generated with these linguistic features accordingly because the words or phrases (codes) used by the respondents in their chosen languages reflected the respondents' conceptualization of identity and conflict. These codes also facilitated the coding process of the thematic analysis of the interviews.

These 18 semi-structured interviews were not intended to achieve statistical representativeness but to access the situated perspectives across diverse professional and regional backgrounds. The respondents do not claim to represent the entirety of Taiwanese civil society, but their accounts offer grounded insight into how individuals experience and interpret Taiwan's public diplomacy in the countries where they have lived and worked. In particular, the interviews provide more nuanced and pragmatic views than the official narratives found in policy documents. While the policy documents reflect the state's evolving diplomatic strategy, they do not capture the lived experiences, affective responses, and identity negotiations that Taiwanese expatriates encounter. This dissertation adopts the view that public diplomacy in Taiwan is not exclusively state-driven but increasingly shaped and co-produced by active citizens. As discussed in Chapter 2, state initiatives such as the New Southbound Policy have explicitly encouraged civil society engagement and people-to-people diplomacy. The semi-structured interviews thus serve not only to supplement the governmental

narratives but also to foreground the civil society perspectives. By selecting individuals who have experienced major historical conflictual events, the interviews enrich this dissertation's exploration of identity-based conflict and public diplomacy from the bottom up, which is often invisible in official discourse.

5.4 Data Operationalization of Key Concepts

The operationalization of key concepts draws upon insights gleaned from the literature review chapters on East Asian Security, conflict resolution in East Asia, and China's and Taiwan's public diplomacy. The theoretical frameworks from these chapters have guided the conceptualization of key concepts within this research design chapter. The theoretical perspectives have elucidated the interconnections among security, conflict resolution, and public diplomacy in the context of East Asia, particularly in the case of China and Taiwan. Therefore, the data collection and analysis process is structured to reflect these conceptual frameworks, ensuring a comprehensive exploration of the research question. The data set derived from policy documents was utilized to examine these key concepts, focusing on their manifestation within official diplomatic reports. On the other hand, the data set obtained from semi-structured interviews was employed to explore the conceptualization of conflict and public diplomacy from the perspective of individuals residing in East Asia.

5.4.1 Data Operationalization: Policy Documents

The operationalization of the policy documents involved three stages: (a) setting up key concepts into a spectrum, (b) creating a term list, and (c) analysis with the DocuSky software.

First, I constructed a spectrum to capture concepts of peace and conflict, drawing on insights from the literature review chapters and grounded in Taiwan's historical and cultural context. This framework, presented in Figure 5.1, ensured that conflict resolution concepts were not imported from external theories but adapted to Taiwan's specific context.

Second, based on this spectrum, I categorized words into two groups: one for peace and one for conflict, as compiled in the resulting term list in Table 5.1. These terms were employed as codes in the analysis of the government documents.

Third, I applied the list to the texts of 21 policy documents using the open-source software DocuSky⁷ system, which is designed and managed by National Taiwan University. DocuSky was selected for its compatibility with traditional Mandarin, the language of Taiwan’s official documents. Through topic modeling, the analysis traced Taiwan’s evolving narratives on foreign relations in East Asia, highlighting conceptualizations of security, conflict, and public diplomacy. The results provide an overview of how Taiwan’s public diplomacy has developed in relation to its East Asian neighbors, with detailed findings presented in *Chapter 6*.

Figure 5.1 – Spectrum of Peace and Conflict



Table 5.1 – Term List

Peace, stability, cooperation, collaboration	和睦, 和諧, 和平, 和藹, 和好, 融洽, 平和, 友善, 友好, 友愛, 敦睦, 溫和, 親睦, 和氣, 妥協, 互惠, 互利, 共存, 共生 協調, 調協, 調勻, 調和, 調諧, 諧和, 諧調, 諧和, 相和, 協和, 祥和, 和煦,
Conflict, war, unification, revolution	統一, 合併, 統戰, 戰爭, 戰鬥, 交戰, 奮鬥, 打仗, 戰役, 交鋒, 干戈, 搏鬥, 交兵, 兵戈, 革命, 鬥爭, 獨立, 振興, 復興, 崛起, 強盛, 興盛, 解放, 維穩

5.4.2 Data Operationalization: Semi-structured Interviews

In the first stage of the data collection, respondents received an invitation along with an outline of questions and explanations of three chosen historical conflictual events as detailed in Table 5.2, titled ‘Outline of Questions’, and Table 5.3, titled ‘Explanation of Three Chosen Conflictual Events’. These are also included in the consent form given to respondents (see Appendix I).

⁷ <https://docusky.org.tw/DocuSky/home/>

Table 5.2 – Outline of Questions

Description	<ul style="list-style-type: none"> • How would you describe the conflict? • What are the reasons that make it a conflict? • Has there been any effort made to appease the conflict?
Opinion	<ul style="list-style-type: none"> • What solutions have the experts proposed to appease the conflict? • Have you spotted the government (China's/Taiwan's) engaged in diplomatic policy to appease the conflict? Do you think they are effective in resolving conflicts? • What do you think of the (China's/Taiwan's) public diplomacy practices?

Table 5.2 illustrates that the interviews were in a semi-structured format, designed to prompt the respondents to describe their experiences and articulate their observations and views. The descriptive nature of the questions aimed to elicit respondents' language, capturing the words or phrases (codes) they used to describe the conflict. In Table 5.3, each conflict type is accompanied by a question mark, aligning with the interview questions. This approach encouraged respondents to provide their perspectives on how they would describe the conflict and the reasons they attributed to each historical event. This method enabled the investigation of the concepts of conflict and conflict resolution from the perspectives of civil society and individuals.

Table 5.3 – Explanation of Three Chosen Historical Conflictual Events

Event Code	Conflict Type	Events
A	Territorial Issue?	2002 Phnom Penh, Cambodia, Declaration on the Conduct of Parties in the South China Sea 2016, Arbitral Tribunal to the 1982 United Nations Convention on Law of the Sea between the Republic of the Philippines and the People's Republic of China
B	Economic Trade Crisis?	2010 Chong Ching, China, Cross-Straits Economic Cooperation Framework Agreement 2014 Taipei, Taiwan, Sunflower Movement against the trade agreement
C	State-society Relations?	2020, COVID-19 crisis border control/immigration

While the interview questions, along with the explanation of the historical conflictual events, were explained to respondents in the consent form, the questions were further elaborated during the interview, which can be seen in Appendix II. After the initial interview, the respondents received a preliminary analysis of their interview responses, which can be seen in Appendix III. They were invited to provide supplementary details to either description-type or opinion-type questions. The

interviews remain confidential and not traceable to the respondents' identification. Respondents were provided with a profiling of their interviews, as shown in Table 5.4, titled 'Interview Profiling.' In this profiling, only the boxes marked with an asterisk were mandatory, while the other boxes were optional.

Table 5.4 – Interview Profiling

A	The South China Sea	B	ECFA Trade Agreement	C	COVID-19 Border Control		
Respondents* Pseudonym		Date of Interview*	Age	Gender	Occupation	Position	

Respondents coded in X shared their memories, observations, and experiences from all other historical conflictual events. Only 1 respondent shared the experiences about only two historical conflictual events and thus is coded as BC3, indicating the provision of experiences about events B and C. In total, 9 respondents shared their experiences with more than one event, while the remaining 9 respondents shared experiences about only one event. The average time duration of the interviews for respondents with multiple events differed by less than five minutes compared to the respondents with only one event. The reasons for respondents choosing to be interviewed about only one event were not further investigated, as interview content and questions were based on the respondent's initiative to select the event of interest. The results of the interviews profiling from 18 respondents are presented in Table 5.5.

Table 5.5 – Results of Interview Profiling

Event code	More than one event	Only one event
A: The South China Sea	AX1, AX2	
B: Economic Cooperation Framework Agreement	BX1, BX2, BC3	BE1, BE2, BE3
C: COVID-19	CX1, CX2, CX3, CX4	CE1, CE2, CE3, CE4, CE5, CE6

Based on the event types covered in all interviews, the data gathered consisted of 15 interviews focused on the COVID-19, 12 interviews on the ECFA, and 8 interviews on the South China Sea. Table 5.6 lists the date of the first stage of interviews conducted, the second stage of interviews whether supplementary details were provided, and the language used during the interview. It is worth noting that the COVID-19 event was ongoing during the interview period. For respondents engaged with the ECFA event, it

was perceived as a historical event that occurred around 2012 - 2014. The South China Sea event presented more variability in terms of its historical timeline, as evidenced by respondents' descriptions of the conflict's origins and development. Some respondents claimed it began in the 1990s, while others suggested it was a more recent development, particularly since 2013 when Xi Jinping became the Secretary-General of the CCP. In addition, respondents coded with event B, the ECFA, have all provided supplementary details of opinion-type questions in the second stage of data collection, except for respondent BE1. Although more respondents were coded with event C, fewer supplementary details were provided, except for respondents CX4, CE4, and CE6.

Table 5.6 – List of Interviews Conducted (in Alphabetical Order of the Respondent Code)

Respondent Code	1st stage: Interview Date	2nd stage: Supplementary Details	Language used during Interview
AX1	2 Feb 2023	Confirmed	Mandarin, partially English
AX2	5 Feb 2023	Supplied opinion-type questions	Mandarin, partially English
BX1	7 Feb 2023	Supplied opinion-type questions	Taiwanese
BX2	17 Feb 2023	Supplied opinion-type questions	Mandarin
BC3	5 Feb 2023	Supplied descriptive and opinion-type questions	Mandarin
BE1	29 Dec 2022	Confirmed	Taiwanese, partially Mandarin
BE2	10 Feb 2023	Supplied opinion-type questions	Mandarin
BE3	12 Feb 2023	Supplied descriptive and opinion-type questions	Mandarin, partially Taiwanese
CX1	19 Feb 2023	Confirmed	Mandarin, partially Taiwanese
CX2	24 Feb 2023	Confirmed	Mandarin, partially Taiwanese
CX3	16 Mar 2023	Confirmed	Mandarin, partially English
CX4	13 Mar 2023	Supplied opinion-type questions	Mandarin
CE1	25 Mar 2023	Confirmed	Mandarin, partially English
CE2	12 Jan 2023	Confirmed	Taiwanese
CE3	10 Feb 2023	Confirmed	Mandarin
CE4	14 Feb 2023	Supplied descriptive-type questions	Mandarin, partially English
CE5	2 Mar 2023	Confirmed	Mandarin
CE6	20 Jun 2023	Supplied descriptive-type questions	Mandarin

5.4 Summary

This chapter has outlined the qualitative approach employed to investigate the relationship between Taiwan's evolving narrative of foreign relations and its strategic use of public diplomacy as a mechanism for conflict resolution. The methodological design is grounded in the conceptual discussions of identity, security, and conflict resolution developed in the literature review chapters, which inform the operationalization of key concepts such as peace and conflict. To capture both institutional and societal dimensions, the research integrates two data sources: Taiwan's diplomatic policy reports spanning from 2000 to 2020 and semi-structured interviews with Taiwanese expatriates. This combination of top-down policy analysis and bottom-up experiential perspectives provides a richer and more nuanced understanding than reliance on a single data type. By bridging governmental narratives with lived experiences, the research addresses a critical gap in the literature, which has often overlooked Taiwan's distinct approach to public diplomacy amid its contested international status. This interdisciplinary perspective provides an original contribution to the fields of security and diplomacy studies, with a fresh lens on how public diplomacy strategies are conceptualized and practiced to address identity-based conflicts.