

Idealism and Pragmatism: The Boxer Indemnity Scholarship Program and the Beginning of America's Educational Diplomacy with China

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Introduction

Started from 1909 and set up to continue for thirty one years, the Boxer Indemnity Scholarship Program¹ (hereafter the BISP) left a notable mark in the history of Sino-American relations. This American refund of the Boxer Indemnity “aided a number of diverse schools and universities throughout China.”² Among them, the most prominent was the establishment in 1911 in Beijing of a preparatory school, which was the predecessor of Tsinghua University.³ During the operation of this educational project, this school trained and sent “hundreds of Chinese to the United States as students.” Many returned to China “as doctors, engineers, scientists and teachers.”⁴ In short, this program “put higher education in China and in the United States within the reach of thousands of Chinese students.”⁵ In addition, Theodore Roosevelt's 1908

1 The Boxer Rebellion was anti-foreign movement initiated by peasants but supported by the Chinese government that claimed hundreds lives of foreigners. It broke out in November 1899 when rebels' sieged the legation quarter in Beijing, and the rebellion reached its peak in the summer of 1900. The western powers sent expeditionary troops to relieve the crisis and occupied Beijing. As a condition for withdrawing, the western powers demanded the Chinese government to sign a protocol stipulating China's obligation to pay an indemnity of 450 million tales of silver (equivalent to 333 million dollars). The American share of this indemnity was about 25 million dollars, and almost half of this amount was remitted by the U.S. government in 1908, for establishing schools in China and sending Chinese students to universities in the United States.

2 Theodore D. Pappas, “Arthur Henderson Smith and the American Mission in China,” *The Wisconsin Magazine of History* 70, no. 3 (1987): 180.

3 Located in Beijing, Tsinghua University (清华大学), is one of the most prestigious universities in China.

4 Pappas, “Smith and the American Mission,” 180.

5 *Ibid.*, 182.

executive order directed that while China paid off its indemnity, the US would return the surplus indemnity on monthly installments.⁶ This remission arrangement also ensured that the unrest and turbulence of the early twentieth century China could not impact the BISP, allowing it to become “the most important scheme for educating Chinese students in America and arguably the most consequential and successful in the entire foreign-study movement of twentieth century China.”⁷

While recognizing the benefits achieved by the BISP in educating Chinese, the influence of this scheme was not merely confined to bringing modern education to China. By remitting a portion of the indemnity and devoting it to educational purposes, the effect of this “very far-reaching” project was, as an American government report at the time concluded, “altogether inestimable.”⁸ Diplomatically, the BISP “has placed the United States, in the minds of the Chinese, in a category entirely different from that of any other nationality.”⁹ It is hence not surprising that this educational program is often hailed as an “act of international friendship.”¹⁰ In other words, the initiation of the BISP exerted positive effects on Chinese-American diplomacy.

There should be a connection between America’s China policy with the establishment of the BISP considering it was launched in early twentieth century, which is a “watershed in U.S foreign policy.”¹¹ Additionally, it was preceded by the articulation of the “Open Door Policy,”¹² which became

6 Theodore Roosevelt, “Executive Order,” Papers Relating to the Foreign Relations of the United States, December 3, 1908, <https://history.state.gov/historicaldocuments/frus1908/d64>.

7 Weili Ye, *Seeking Modernity in China’s Name: Chinese Students in the United States, 1900-1927* (Redwood City: Stanford University Press, 2001), 10.

8 Committee on Foreign Affairs, *Chinese Indemnity: Hearings Before the United States House Committee on Foreign Affairs, Sixty-Eighth Congress, First Session* (Washington: U.S. Government Printing Office, 1924), 65.

9 Ibid.

10 Jerry Israel, *Progressivism and the Open Door: America and China, 1905-1921* (Pittsburgh: University of Pittsburgh Press, 1971), 43.

11 Qingjia Edward Wang, “Guest from the Open Door: the Reception of Chinese Students into the United States, 1900s-1920s,” *The Journal of American-East Asian Relations* 1, no.3 (1994): 55.

12 The Secretary of State John Hay articulated the concept of the “Open Door” in a series of diplomatic notes in 1899-1900 which aimed to secure the equal opportunity for international trade and commerce in China, as well as China’s administrative and territorial integrity. The paper will further explain this policy in a subsequent section.

America's official policy towards the Far East in the first half of the twentieth century.¹³ In light of the BISP's establishment at a diplomatically critical time, when studying this indemnity-for education project, it is necessary to consider America's diplomatic priorities.

Yet researchers, especially those in China, tend to look at the BISP as a "single case"¹⁴ and rarely put this plan within the framework of U.S. diplomatic history or the history of Sino-America relations.¹⁵ As a result, it is not uncommon for the BISP to be merely taken as the "second wave of Chinese student enrollments in American colleges and universities."¹⁶ Despite this program resuming large-scale Chinese student enrollments in American schools, especially significant after the termination of the Chinese Educational Mission (hereafter the CEM)¹⁷, this common assessment needs rethinking. Others claim that the BISP was America's second attempt to exert influence on China after the failure of the CEM.¹⁸ Both these two claims may contribute to the formation of a less comprehensive and accurate understanding of the BISP and the CEM.

This paper analyzes how Chinese-American relations influenced the materialization of the CEM and the BISP. It argues that regarding them as "two waves" of Chinese students coming to American schools, or "two attempts" of the United States at influencing China only lead to ignoring the important differences between these two educational projects. Studying the background and implementation of the CEM and BISP through the lens of the historically dynamic China-U.S. diplomatic relationship, the paper reveals that although the CEM was a Chinese government-sponsored program for American education, it was both premature and almost entirely the effort of a single individual, rather

13 "Secretary of State John Hay and the Open Door in China, 1899-1900," Office of the Historian, accessed September 18, 2021, <https://history.state.gov/milestones/1899-1913/hay-and-china>.

14 Wei Chen, *The Game of Education: The Boxer Indemnity Scholarship in the Perspective of US China Policy in the Early 20th Century* (Beijing: MA Thesis, China Foreign Affairs University, 2016), 2.

15 Zongli Guo and Rui Mao, "The Domestic Researches on the 'Remission of the Boxer Indemnity' by the United States in Recent Ten Years," *History Teaching* no.5 (2007): 93.

16 Teresa Brawner Bevis, *A History of Higher Education Exchange: China and America* (New York: Routledge, 2013), 89.

17 Started in 1872 and terminated in 1881, the Chinese Educational Mission (the CEM) is China's first government sponsored study abroad program in the United States.

18 Ning Qian, *The Chinese Students Encounter America*, trans. T. K. Chu (Hong Kong: Hong Kong University Press, 2002), xvii.

than a government consensus. In contrast, the American government established the BISP with the intention of helping to shape American policy towards China at the turn of the twentieth century. The US government had not made the CEM a priority. The BISP, however, was almost entirely designed by American politicians. This discrepancy indicates that the BISP began the use of education by the United States for achieving its diplomatic goals in China. In short, whereas the CEM tended to be the work of an individual, the BISP marks the beginning of America's educational diplomacy with China. This paper provides a better understanding of the difference between these two educational schemes. This very difference, which is constantly ignored, is more significant than the disparity of the two schemes in their sequence, length, scope and scale since it helps to identify when and why education became a tool for America's diplomacy with China.

The Prematurity and Coincidence in the CEM

Begun in 1872 and operated in the United States until 1881, the CEM was the first Chinese government-sponsored study abroad program. As a component of the "Self-Strengthening Movement"¹⁹ from 1872 to 1875, the Qing government dispatched 120 students in annual installments of thirty students. They were expected to acquire "foreign techniques" in such fields as military science, astronomy, mathematics and engineering so that "China could gradually be strengthened."²⁰ Consequently, the graduates of the CEM "made groundbreaking contributions" to the development of China in technology and "served as vital mediators" between China and the West during the last decades of the Qing dynasty.²¹

Two persons are vital to the materialization of this unprecedented educational program, respectively Yung Wing and Anson Burlingame. As the first Chinese

19 The Qing government launched the Self-Strengthening Movement in early 1860s, with the intention of modernizing China through, as a contemporary slogan put it, "Chinese studies for the essence, Western studies for the practical application."

20 Guofan Zeng, "The Memorial of Selecting and Sending Intellectual and Bright Lads to Study Abroad," in *Materials on Modern Chinese History: Self-Strengthening Movement* (Shanghai: Shanghai People's Press, 1961), 153.

21 Stacey Bieler, *"Patriots" or "Traitors"? A History of American-Educated Chinese Students* (New York: M.E. Sharpe, 2003), xii.

Yale graduate, Yung Wing's years-long urging upon Qing officials the necessity of foreign education was instrumental in the imperial court's approval of the CEM.²² Meanwhile, the friendly attitude towards China of Anson Burlingame, who was the first American minister to China in Beijing from 1862 to 1867, earned him the appointment of the empire's first envoy to the West. He led China's first diplomatic mission to the United States, in which the delegation reached the 1868 Burlingame Treaty whose seventh article granted Chinese students the most favored nation treatment in American public schools. Thus, scholars believe this very provision is a manifestation of China's willingness of opening educational exchange with America.²³ It also suggested a "contractual basis" the United States offered which later ensured the CEM to be conducted there.²⁴ However, a reexamination of Yung Wing's experience of lobbying for the foreign educational mission, as well as the essence of the Burlingame Treaty, leads to an entirely different viewpoint.

Yung Wing was unique among his traditionally educated Chinese counterparts. After being educated in Macao and Hong Kong, he sailed to the United States and finished his studies at Yale in 1854. He returned to China one year later with the determination of enabling the rising generation of China to have the same education that he had²⁵, but soon found there was no space for displaying this ambition. Despite concluding that Western education is "the most feasible method" to reform and regenerate China²⁶, it was considered irrelevant to the civil servant examination system by which young Chinese achieved fame and prosperity. This made study abroad unappealing. Nor could he present his scheme to any influential official as he planned.²⁷ His efforts therefore yielded little fruit during the first five years after his return.²⁸ Obviously, Yung Wing's foreign education project for the reformation and regeneration of China was

22 "Mr. Low to Mr. Fish," Papers Relating to the Foreign Relations of the United States, July 12, 1872, <https://history.state.gov/historicaldocuments/frus1872p1/d84>.

23 Biyin Liang, *The Study on Sino-American Cultural Exchange in Modern History* (Guangdong: Sun Yatsun University Press, 2009), 75.

24 Biying Liang, *Chen Lanbin and the Diplomacy of Late Qing Dynasty* (Guangdong: Guangdong People's Press, 2011), 97.

25 Yung Wing, *My Life in China and America* (New York: Henry Holt Company, 1909), 15.

26 *Ibid.*, preface.

27 Joseph H. Twitchell, "An Address Delivered before Kent Club of the Yale Law School, April 10, 1878," in *My Life in China and America*, 89.

28 *Ibid.*

conceived when the foundation of its implementation in that empire was nearly impossible. Even the initiation of the Self-Strengthening Movement did not bring converts to Yung Wing's plan. The government's conservatism remained.

This campaign did, however, bring Yung Wing an opportunity to meet the powerful official Zeng Guofan (曾國藩).²⁹ Unsure of Zeng's own inclinations, Yung Wing put his study abroad plan "in the background" during his first interview with Zeng.³⁰ Subsequent work as a translator gave him further access to important officials, but until 1870, most of them heard his educational plans with indifference.³¹ His attempt in 1867, one year before the Burlingame Treaty was concluded, at bringing his foreign education plan to the imperial court also fell through. Though he made a meticulous arrangement by using three other proposals as the chaperon and placing his scheme second in the sequence to avoid giving it too much prominence, he could not find anyone to present the ideas on his behalf.³²

It was the 1870 Tianjin Massacre (天津教案)³³ that accidentally helped bring Yung Wing's scheme to fruition. To settle the aftermath, a commission including Zeng Guofan was assigned to negotiate with foreign representatives, and Yung Wing joined as interpreter. He took this chance to restate his plan, and used this riot to illustrate its necessity.³⁴ This time, Zeng agreed to incorporate the plan in a memorial to the throne and the approval from Beijing marked the consummation of Yung Wing's efforts and the realization of the CEM.

Yung Wing's effort to establish the CEM reveals the unlikelihood for the Chinese government to solicit a most favored nation clause for its students in the negotiation of the Burlingame Treaty. Evidently, the imperial government had no intention of sending students abroad when this treaty was concluded

29 As the Viceroy of the Liangjiang area (兩江總督), Zeng was one of the most powerful officials in the 1860s and was a major advocate of the Self-Strengthening Movement. The Liangjiang area (兩江地區) included the Provinces of Jiangsu, Anhui, Jiangxi and the city of Shanghai (江蘇省、安徽省、江西省、上海市). He was in charge of the political, civil and military affairs in of these places.

30 Wing, *China and America*, 52.

31 Twitchell, "Address before Kent Club," 92.

32 Wing, *China and America*, 60.

33 The Tianjin Massacre broke out in the summer of 1870, and was caused by the locals' misunderstanding the work conducted by the Roman Catholic Church in the city. It resulted in the burning down of foreigner-owned properties such as a church and hospital, and the murder of several priests and nuns.

34 Twitchell, "Address before Kent Club," 92.

since the CEM could have been further delayed without the Tianjin Massacre. As hard as Yung Wing worked, therefore, the provisions to educate students in America owes more to the intention and designs of the United States.

Except granting Chinese students the most favored nation treatment in American public schools, the seventh article of the Burlingame Treaty offered the same privileges to Americans in Chinese schools controlled by the government. Additionally, it also provided freedom for Americans concerning establishing and maintaining schools in China where foreigners were permitted to reside. It is noticeable although the Burlingame Treaty features the application by a Western power of the principle of reciprocity to China for the first time, the use of its certain provisions, however, is "neither very common or even likely."³⁵ That is to say, some clauses may only be paper promises made to maintain the treaty's appearance of reciprocity. In addition, as the preamble of the Burlingame Treaty claims, this agreement was concluded based on circumstances that had arisen during the ministerial term of Anson Burlingame in China. It was a period when the two countries "were not important to, or even interested in, each other,"³⁶ and the involvement of America in China was mainly confined to having a "relatively small but profitable trade."³⁷ In light of this, it can be assumed that the most favored nation treatment for Chinese students was another "paper promise" since America's interest in that empire had not yet extended to training Chinese.

This assumption can be confirmed by investigating the correspondence between the U.S. legation and consulates in China and the Department of State during the period when Burlingame was in office. This was nearly the same period Yung Wing was pleading for the CEM's adoption. Diplomatic documents show no specific interest in providing education to Chinese, and this again suggests the lack of interest in this provision from the American side. Similarly, there was no mention of the matter as to Chinese establishing schools in America or Americans attending Chinese public schools. The only education-

35 John Schrecker, " 'For the Equality of Men-for the Equality of Nations' : Anson Burlingame and China's First Embassy to the United States, 1868," *Journal of American-East Asian Relations* 17, no.1 (2010): 29.

36 Guoqi Xu, *Chinese and Americans: A Shared History* (Cambridge: Harvard University Press, 2014), 29.

37 David L. Anderson, *Imperialism and Idealism: American Diplomats in China, 1861-1898* (Bloomington: Indiana University Press, 1986), 10.

related project that received constant urging was establishing an interpreter-training school in China. Such demand demonstrated China's marginality in the diplomatic concerns of the United States.

Due to the insufficiency of interpreters in American consulates in China, their consuls were "compelled to request the aid of missionaries in their interviews or correspondence with Chinese officials."³⁸ Seeing that interpreters are "vital to the efficiency of our consular service and measurably to the honor of our nation," the Chargé d'Affaires Samuel Williams claimed "the country must educate them."³⁹ Recognizing the duties of interpreters such as deciding cases in consular court and corresponding with native officials are "extensive and difficult," George Seward, the Consul General in Shanghai, believed such a school could make his consulate "comparatively effective."⁴⁰ Furthermore, those interpreters were also expected, in the future, to become consuls conversant with the language and customs of China.⁴¹ Considering the consulates of many other powers in China "are all supplied with trained interpreters,"⁴² this plan aimed at bringing the consular institutions of America in that empire, to the same line with theirs, and, as Burlingame stated, reflects "lasting honor upon our beloved country."⁴³

Although neither Anson Burlingame nor Secretary of State William Seward left any records from the Burlingame Treaty negotiations⁴⁴, this treaty aimed to solve problems that emerged during Burlingame's tenure. As having trained

38 "Mr. Burlingame to Mr. Seward," Papers Relating to the Foreign Relations of the United States, May 19, 1862, <https://history.state.gov/historicaldocuments/frus1862/ch18>.

39 "Mr. Williams to Mr. Burlingame," Papers Relating to the Foreign Relations of the United States, October 24, 1865, <https://history.state.gov/historicaldocuments/frus1866p1/d375>.

40 "Mr. G.F. Seward to Mr. Burlingame," Papers Relating to the Foreign Relations of the United States, September 16, 1865, <https://history.state.gov/historicaldocuments/frus1866p1/d376>.

41 "Mr. Williams to Mr. Burlingame," Papers Relating to the Foreign Relations of the United States, October 24, 1865, <https://history.state.gov/historicaldocuments/frus1866p1/d375>.

42 "Mr. Burlingame to Mr. Seward," Papers Relating to the Foreign Relations of the United States, May 19, 1862, <https://history.state.gov/historicaldocuments/frus1862/ch18>.

43 "Mr. Burlingame to Mr. Seward," Papers Relating to the Foreign Relations of the United States, November 18, 1863, <https://history.state.gov/historicaldocuments/frus1864p3/d396>.

44 Frederick W. Williams, *Anson Burlingame and the First Chinese Mission to the Foreign Powers* (New York: Scriber's, 1912), 144-5.

interpreters was the only educationally relevant subject, whose importance was unanimously agreed upon by American diplomats in China, it should not be missed in the negotiation. Namely, with a provision allowing Americans to establish schools in China, the education-themed seventh article was originally meant to establish an interpreter training school, while the most favored nation clause for Chinese students only served to sustain the treaty's surface appeal to reciprocity.

In sum, the CEM was launched when the governments of both China and the United States were still largely indifferent to having Chinese students in American schools. On the contrary, it came into being largely through the efforts of Yung Wing who seized a chance accidentally provided by a riot and turned a treaty stipulation's original purpose on its head. His lobbying over more than a decade cannot be overlooked. It is therefore fair to call him the "head and front" of this project.⁴⁵ Nevertheless, the lack of support he received, and the rather haphazard way the educational provision made its way into the Burlingame Treaty suggests that the CEM was not a priority for either government.

In fact, the indifference continued even after the CEM students arrived in America. Neither Chinese nor American governmental officials were involved even in helping them find accommodations. Instead, Yung Wing carried out this task with the advice of his friend and president of Yale, Noah Porter, and with help from members of the Connecticut Board of Education.⁴⁶ The BISP, by contrast, would demonstrate an entirely different set of priorities.

The Open Door Policy that Resulted in the Surplus Indemnity for the BISP

The significance of China to the United States increased during the interval between the termination of the CEM and the initiation of the BISP. Especially in late 19th century, the maturing of the industrial revolution of America

45 Twitchell, "Address Delivered before Kent Club," 87.

46 Bieler, "*Patriots*" or "*Traitors*"? 6. However, before the BISP students were sent to the United States, the Foreign Office of China solicited the assistance from the American Government in the matter of "providing suitable homes for them in America." See "The Foreign Office to Minister Rockhill," Papers Relating to the Foreign Relations of the United States, July 14, 1908, <https://history.state.gov/historicaldocuments/frus1908/d58>.

increased its commercial interest with China, while its acquisition of the Philippines demonstrated America's growing economic interests in the Pacific region.⁴⁷ As William Sulzer, a long-serving New York congressman claimed in 1898, American businessmen should look to the Pacific because the great volume of trade and commerce will be westward during the coming century.⁴⁸ In the meantime, with little political clout and no territory, America's presence in China was still relatively weak compared with Europe and Japan.⁴⁹ So when those nations secured their own spheres of influence in China in 1898, Americans faced the potential of being excluded from Chinese markets.⁵⁰

Out of apprehension that exclusive spheres of influence may jeopardize America's rights under its treaties with China, Secretary of State John Hay in 1899 released diplomatic notes to powers active in China.⁵¹ Hay requested them to declare non-discriminatory treatment within their respective spheres, to all vessels and merchandise regardless of their nationality and to assure equal opportunity for commerce and trade.⁵² This principle was in danger no sooner than its release since the powers' expeditionary armies aimed to relieve the Boxer crisis took advantage of their march to Beijing in 1900 by securing their own concessions along the way.⁵³ Seeing that the United States preferred to trade with China as an entity⁵⁴, Hay went a step further in his circular notes by advocating the necessity of preserving the territorial and administrative integrity of China for "equal and impartial trade with all parts of the Chinese Empire."⁵⁵ Together, Hay's notes from 1899 and 1900 built a connection between the commercial interests of the United States and the integrity of China, and

47 Ronald Shaffer, *Toward Pearl Harbor: the Diplomatic Exchange between Japan and the United States, 1889-1941* (Princeton: Marcus Weiner, 1991), 3.

48 Paul A. Vard, "William Woodville Rockhill and the Open Door Notes," *The Journal of Modern History* 24, no.4 (1952), 375.

49 "John Hay and the Open Door."

50 Shaffer, *Toward Pearl Harbor*, 5.

51 Those nations included Britain, France, Germany, Italy, Japan and Russia.

52 "Correspondence Concerning American Commercial Rights in China," Papers Relating to the Foreign Relations of the United States, September 6, 1899, <https://history.state.gov/historicaldocuments/frus1899/ch30>.

53 "John Hay and the Open Door."

54 Shaffer, *Toward Pearl Harbor*, 7.

55 "Circular Note of July 3, 1900, to the Powers Cooperating in China, Defining the Purposes and Policy of the United States," Foreign Relation of the United States, Appendix, Affairs in China., July 3, 1900, <https://history.state.gov/historicaldocuments/frus1901China/d4>.

constructed the so called "Open Door Policy," which became "the basis" of the Far Eastern Policy of the United States for decades in 20th century.⁵⁶ Moreover, at the time when the European powers and Japan were aggressive towards the territory of China, this policy seemed more moderate and promised some protection for Chinese territory, and thus contributed a "special relationship" between the two nations.⁵⁷

The formation of the Open Door Policy in 1900 symbolizes the end of America's "Jackal Policy"⁵⁸ in China during the 19th century, a policy of achieving rights with the British in the vanguard.⁵⁹ As the first independent China policy of the United States, the Open Door Policy indicated its growing interest in the Far East and was adhered to in the following decades by the successors of Secretary of State John Hay.⁶⁰ Its first application was in the 1901 international negotiation in Beijing for the settlement of the Boxer Rebellion and resulted in an excessive indemnity which was later devoted to establishing the BISP.

America's adherence to the Open Door Policy in the negotiation can be exemplified by the correspondence between Secretary of State John Hay and US representatives at the scene. Unlike the European powers such as Germany, whose representative claimed China shall pay "the last cent of her expenses,"⁶¹ Americans presented an entirely different attitude towards the indemnity amount. They believed an exorbitant sum could hurt China's purchasing power⁶², and even result in the disintegration of China.⁶³ Either of these outcomes was considered detrimental to America's commercial interests in China. Therefore, concluding that China could not pay a lump sum more than 150 million dollars, Hay instructed Minister Edwin Conger to use his "utmost effort" to have the indemnity made "as reasonable as possible."⁶⁴ To ensure the implementation of

56 Paul A. Varg, "William Woodville Rockhill's Influence on the Boxer Negotiation," *Pacific Historical Review* 70, no.3 (1949): 370.

57 "John Hay and the Open Door."

58 Anderson, *Imperialism and Idealism*, 10.

59 David Gedalecia, "Letters from the Middle Kingdom," National Archives, accessed September 10, 2021, <https://www.archives.gov/publications/prologue/2002/winter/gedalecia-1.html>.

60 "John Hay and the Open Door."

61 Varg, "Boxer Negotiation," 378.

62 Chen, *the Game of Education*, 18.

63 Biyin Liang, *Liang Cheng and China in Modern History* (Guangdong: Sun Yatsun University Press, 2011), 247.

the Open Door Policy, the secretary specifically cabled American Commissioner William Rockhill in Beijing that the indemnity needed to be paid in money rather than in territory.⁶⁵ Three weeks later, Hay declared his government's preference for increased privileges and administrative reforms from China, over a large cash indemnity.⁶⁶ As the date for deciding the indemnity amount approached, Hay approved Rockhill's suggestion in regard to reducing the lump sum, with compensating commercial advantages.⁶⁷ Thus, during the Boxer negotiation the US's three major concerns were a moderate indemnity, commercial privileges and maintaining China's territorial integrity.

To ensure the demands could be met, John Hay entered an inflated indemnity claim amounting to 250 million dollars which was two times higher than America's actual losses and expenses during the Boxer Rebellion. Intending to reduce this amount by half if other powers followed suit⁶⁸, he took the excess as a "bargaining counter" to convince other powers to reduce their claim and to secure privileges in trade.⁶⁹ But the result fell short of his expectation since the negotiation was dominated by the European powers.⁷⁰ Consequently, the bargaining strategy failed and left China with substantial debt. This made returning the surplus one of Hays' top priorities.⁷¹

It can be seen that the excess indemnity that eventually financed the BISP resulted from America's Open Door Policy. In consideration of Hays' policy advocating for a reasonable and moderate indemnity, returning the excessive amount was consistent with this principle. In other words, the indemnity fund paid for the initiation of the BISP, and demonstrates that the effort was

64 "Mr. Hay to Mr. Conger," Foreign Relation of the United States, Appendix, Affairs in China, January 29, 1901, <https://history.state.gov/historicaldocuments/frus1901China/d231>.

65 Mr. Hay to Mr. Rockhill," Foreign Relation of the United States, Appendix, Affairs in China, April 8, 1901, <https://history.state.gov/historicaldocuments/frus1901China/d260><https://history.state.gov/historicaldocuments/frus1901China/d260>.

66 "Mr. Hay to Mr. Rockhill," Foreign Relations of the United States, Appendix, Affairs in China, April 29, 1901, <https://history.state.gov/historicaldocuments/frus1901China/d267>.

67 "Mr. Hay to Mr. Rockhill," Foreign Relations of the United States, Appendix, Affairs in China, May 10, 1901, <https://history.state.gov/historicaldocuments/frus1901China/d269>.

68 Ibid.

69 Michael H. Hunt, "The American Remission of the Boxer Indemnity: A Reappraisal," *The Journal of Asian Studies* 31, no.3 (1972): 542.

70 Varg, "Boxer Negotiation," 379-80.

71 William Rockhill, "Correspondence between William Rockhill and Theodore Roosevelt," in *The Chinese Students Encounter Americans*, 221.

fundamentally part of America's official policy towards China.

The Idealism and Pragmatism in the BISP

Congress approved return of the indemnity in 1908. The establishment of the BISP in the following year provides further evidence that the BISP was a project reflecting American policy goals. Secretary of State Elihu Root would claim that his government's returning the excess indemnity was the intention "from the first,"⁷² but discussion over exactly how to use the funds began long before America actually returned them.⁷³ That is to say, education was not the only option for how to use the money.⁷⁴ In addition, the anti-American boycott in 1905, resulting from the mistreatment of Chinese in the United States, temporarily soured US-China relations. For a time President Theodore Roosevelt even suggested the refund might be impossible.⁷⁵ In the end, devoting the money to establish the BISP was based on America's own interests, as well as its perceptions of what was best for China.⁷⁶ As a result, the BISP reflects both American altruism and self-interest, or its idealism and its pragmatism, which were the twin poles of American relations with China.⁷⁷

After independence from Britain in 1783, the United States desired to build a national identity featuring freedom, equality, virtue and reason over Europe's autocracy and imperialism.⁷⁸ Its government, believed renovating Asia through social and political sympathies, is "sublime and beneficent."⁷⁹ When it came to diplomacy with China, Americans "believed and would like Chinese to believe

72 "The Secretary of State to the Chinese Minister," Papers Relating to the Foreign Relations of the United States, June 15, 1907, <https://history.state.gov/historicaldocuments/frus1907p1/d153>.

73 Hunt, "Remission of the Boxer Indemnity" 547.

74 For example, Professor Jeremiah Jenks of Cornell University suggested the surplus of the indemnity should be devoted to currency reform in China, Willard Straight, the Consul General in Mukden, proposed the fund should be used to establish a bank in Manchuria, while Yuan Shikai (袁世凯), an influential Chinese official, urged the money be used to build railroads and to develop mining in China.

75 William Martin, *Awakening of China* (New York: Doubleday, Page & Company, 1907), 251.

76 Hunt, "Remission of the Boxer Indemnity" 541.

77 Ibid., 551

78 Chen, *The Game of Education*, 4.

79 Tyler Dennett, "Seward's Far Eastern Policy," *The American Historical Review* 28, no.1 (1922): 47.

they were set apart from British and other colonists by high ideals and morals.”⁸⁰ This mindset continued well into the turn of the 20th century when American policy makers believed that China’s salvation lay in modern Western education, which could cure all social and political ills.⁸¹ As a result, promoting the reformation and civilization of China through education, became a consensus among Americans in government and society who were passionate about Chinese affairs.⁸² Among those idealists, Arthur Smith was a particularly prominent representative.

As a missionary in China for fifty-four years, he earned his reputation as “the American Statesman of China,” and his books on China attracted the interest of presidents and diplomats the world over for their detailed information on that empire.⁸³ In one of his books dedicated to those who recognize the duty of the West to promote the welfare of China⁸⁴, he argued that using the surplus indemnity to educate Chinese students in America could make future outbreaks similar to the Boxer Rebellion more difficult.⁸⁵ According to him, such an act would also demonstrate how the United States put morality ahead of its material interests, and that America would treat China with honesty, fairness and under the motto “America assists the East.”⁸⁶

In 1906 during his audience with Theodore Roosevelt, Smith’s suggestion to use the surplus indemnity for an educational purpose triggered Roosevelt’s first interest in linking the fund to education. Subsequently, he asked Secretary Root to take relevant actions.⁸⁷ Roosevelt’s favorable attitude towards the BISP can be found in his 1907 annual address to the Congress in which he asked for the authority to remit and refund the surplus indemnity. As he noted, the United States should help China “adapt itself to modern conditions” through encouraging and attracting her students to come and take courses in American schools. He urged American educators, to “take concerted action toward this

80 Chen, *The Game of Education*, 4.

81 Pappas, “Smith and the American mission,” 180.

82 Israel, *Progressivism and the Open Door*, 15-22.

83 Pappas, “Smith and the American mission,” 163.

84 Arthur H. Smith, *China and America To-day: A Study of Conditions and Relations* (New York: Fleming H. Revell Company, 1907), preface.

85 *Ibid.*, 220.

86 *Ibid.*, 239.

87 Lawrence F. Abbott, *Impressions of Theodore Roosevelt* (New York: Doubleday, 1919), 146.

end.”⁸⁸ One year later, the President further pointed out the importance of implanting Western ideals in Asia to avoid a “dreadful future clash” between the two civilizations. “If we wait until to-morrow,” he warned, “we may find that we have waited too long.”⁸⁹

Clearly, the BISP contained the expectation that America would uplift China through implanting its ideals, knowledge and culture. This reflects a strain of idealism in US diplomacy. But the BISP was not a purely charitable project, not only because the money for its operation was originally obtained by an excessive charge on China, but because the U.S. also aimed to have its own demands met from this project.

However righteous Smith's words were on the devotion of the surplus indemnity for education, he also cited a memorandum and opinions that reveal the other side of American motivations. The memorandum was from the President of the University of Illinois, Edmund James, to Roosevelt in 1906, which aimed to welcome Chinese students, and to expand America's global influence through education.⁹⁰ The nation that succeeds in educating the Chinese youth, he wrote, will “reap the largest possible returns,” in “moral, intellectual and commercial influence.”⁹¹ Expecting foreign educated Chinese could take important positions in the future, he saw a chance for America to control China's development in the “most satisfactory and subtle” way, by the “intellectual and spiritual domination of its leaders.”⁹² “Trade follows moral and spiritual domination far more inevitably than it follows the flag,”⁹³ he argued, so he was concerned about the inflow of Chinese students to Europe. He reckoned after their return, they would recommend English, French or German for “positions of trust and responsibility” in China and would prefer their goods over those of America.⁹⁴

88 “Message of the President, Annual,” Papers Relating to the Foreign Relations of the United States, December 3, 1907, <https://history.state.gov/historicaldocuments/frus1907p1/message-of-the-president>.

89 Theodore Roosevelt, “Awakening of China,” HathiTrust, November 28, 1908, <https://babel.hathitrust.org/cgi/pt?id=nnc2.ark:/13960/t8md47n33&view=lup&seq=1&sk=2021>.

90 Poshek Fu, “Trans-Pacific Cultural Connections: The University of Illinois and China,” *Journal of American-East Asian Relations* no.24 (2017): 27.

91 Smith, *China and America To-day*, 214.

92 Ibid., 215.

93 Ibid., 218.

94 Ibid., 215.

James was not alone in advocating for the promotion of American interests in China through educating Chinese students in the United States. His views were echoed in 1910 by the American consul-general in Shanghai, who contended that an American-trained Chinese could supply orders to American companies because of his intimate acquaintance with American commercial products.⁹⁵ Politicians in the United States held the same point. As a letter from the Department of Commerce and Labor in 1910 to the Department of State noted, having Chinese students educated in America could familiarize them with American institutions, civic life and business, and would inevitably benefit the commercial interests of the United States.⁹⁶ Walter Hines Page, an influential editor and diplomat agreed. He noted that in the future foreign-educated Chinese students would exert a strong influence “in governmental, educational, financial and industrial way,” so welcoming and training them was the most direct way for America to acquire trade and intellectual influence in China.⁹⁷

It can be seen that in early twentieth century, the significance of educating Chinese students in America to its political and commercial interests in China was widely recognized by American politicians, diplomats, educators and missionaries. Such interests became increasingly important to the United States at the turn of the century as a result of its own growing national strength and its Pacific ambitions. While the US was still a relatively weak power forced to use moral and political suasion in Asia, it chose education and the BISP as a pragmatic means to pursue its larger political and economic ambitions.

Support for the BISP was not, however, inevitable. There was in fact a major competing proposal for how to use the indemnity that had much more to do with finance than education. This plan was the Manchurian Bank Project, jointly presented in 1907 by Xu Shichang, the Viceroy of Manchuria and Tang Shaoyi, the Governor of Mukden.⁹⁸ Having witnessed Japan's increased influence in Manchuria following the Russo-Japanese War, the Chinese government saw the urgency of strengthening their position in that region.⁹⁹ In particular they saw the possibility of using the remitted indemnity as a security for an

95 Wang, “Guest from the Open Door,” 61.

96 Ibid., 67.

97 Israel, *Progressivism and the Open Door*, 44.

98 Mukden (奉天) was the capital city of Manchuria, the current name of this city is Shenyang (沈阳).

99 Hunt, “Remission of the Boxer Indemnity,” 551.

American loan to establish the Manchurian Bank which would then finance railroad construction and other development projects. It was, as Tang Shaoyi noted, "an instrument of foreign policy as well as internal development," because it would create "a concrete interest" for America that would neutralize Japan's influence in Manchuria.¹⁰⁰

Xu and Tang believed Americans would welcome the Manchurian Bank project. Japan's enhanced influence in Manchuria, which Americans deemed a potential market and investment outlet¹⁰¹, made it a "primary threat to the Open Door."¹⁰² Consequently, many American policy makers believed that they must aggressively counter the threat of Japan.¹⁰³

Willard Straight, the American Consul General in Mukden from 1906 to 1908, was a particularly important voice in promoting American investment in Manchuria. He arrived in Mukden determined to keep Manchuria's door open through investing in transportation and development projects.¹⁰⁴ These would, he believed, weaken Japan's hold in Manchuria and increase American influence. Therefore, when Xu and Tang presented Straight their bank-indemnity proposal, he called it a "rare opportunity" of furthering China and his own country's interests in Manchuria.¹⁰⁵ Despite Straight's support, the bank proposal collapsed when the chief of the consular bureau instructed him to withdraw from plans for disposing the Boxer Indemnity funds.¹⁰⁶

America's repudiation of the Manchurian Bank Project demonstrates the Roosevelt Administration's realism-based Far East diplomacy. The acquisition of the Philippines made the United States a power in the Asia-Pacific region.¹⁰⁷ At the same time, however, the Philippines formed America's "heel of Achilles" because they were, as Roosevelt maintained, "temptation in Japan's way" and made "the present situation with Japan dangerous."¹⁰⁸ As a "political realist,"¹⁰⁹

100 Ibid.

101 Sidney L. Pash, *The Current of Wars: A New History of American-Japanese Relations, 1899-1941* (Lexington: University Press of Kentucky, 2014), 23

102 Ibid., 18.

103 Israel, *Progressivism and the Open Door*, 30.

104 Edward H. Zabriskie, *American-Russian Rivalry in the Far East: A Study in Diplomacy and Power Politics, 1895-1914* (Philadelphia: University of Pennsylvania Press, 2016), 139-140.

105 Hunt, "Remission of the Boxer Indemnity," 552.

106 Wilbur J. Carr to Straight, February 10, 1908, cited in Hunt, "Remission of the Boxer Indemnity," 552-3.

107 Shaffer, *Toward Pearl Harbor*, 7.

Roosevelt decided to compromise with Japan to ensure that the Philippines, which were decisive to America's position in East Asia, remained under US control. The 1905 Taft-Katsura Agreed Memorandum of Conversation exemplified this ideology.¹¹⁰

The Manchurian Bank Project threatened Japan's postwar Manchurian policy, which was promoting economic supremacy¹¹¹, and Roosevelt feared that Japan would retaliate by threatening American interests in the Philippines. Left alone in Manchuria, however, Japan could focus its attention there and leave the Philippines to US control.¹¹² The signing of the 1908 Root-Takahira Agreement¹¹³ placed Manchuria within the Japanese Empire¹¹⁴, and symbolized the official US withdrawal of support from the Manchurian Bank Project.

Both the BISP and the Manchurian Bank Project envisioned reforming China, and subsequently promoting American interests and influences. The US was deeply concerned about the potential for Japan to menace the Philippines, and this strategic landscape shaped the US Government's decision to promote educational exchange over the Manchurian bank plan. As one scholar notes, the BISP, "would strengthen ties between the United States and China and strengthen China without angering Japan."¹¹⁵ This demonstrates that the BISP was not a simple measure to promote education, but was connected in much larger geopolitical interests between China, Japan and the US.

108 Roosevelt to Taft, August 21, 1907, cited in Zabriskie, *Rivalry in the Far East*, 136.

109 Thomas G. Paterson et al, *American Foreign Relations: Volume 2: Since 1895* (Stamford: Cengage Learning, 2014), 56.

110 The Taft-Katsura Agreed Memorandum of Conversation was reached in July 1905 between the Secretary of War William Taft and Katsura Taro (桂太郎), the Prime Minister of Japan, during the former's visit in Tokyo. By recognizing Japan's suzerainty over Korea, the United States obtained Katsura's promise that Japan "does not harbor any aggressive design whatever on the Philippines. After the memorandum was signed, Theodore Roosevelt cabled Taft that "I confirm every word you have said."

111 Pash, *The Current of Wars*, 24.

112 Ibid., 26.

113 The Root-Takahira Agreement was reached on November 30, 1908, between the Secretary of State Elihu Root and Takahira Kogoro (高平小五郎), the ambassador of Japan to the United States, in Washington. The agreement stipulated that the United States and Japan shall maintain the "existing status quo" on the Pacific Ocean and "respect the territorial possessions belonging to each other in said region." Willard Straight called this agreement "a terrible diplomatic blunder." See Paterson et al, *American Foreign Relations*, 59

114 Pash, *The Current of Wars*, 25.

115 Bieler, "Patriots" or "Traitors"? 44.

Conclusion

Despite both the CEM and the BISP enabling Chinese students to pursue their education in America in a large scale, there is a considerable difference between these two educational projects from the perspective of Sino-America relations. The CEM was a project predominantly initiated by a persistent individual with the help of certain accidental factors at a time when both China and America were fairly indifferent to each other. The BISP, on the other hand, was an American-led project from the beginning. The fund for its operation was generated by the implementation of America's official China policy, and became available after the approval of Congress. Its primary aim was to benefit America's increasingly important commercial and strategic interests in China followed by the intention of strengthening and uplifting China, and was acknowledged by Americans in education, business and politics. This acknowledgement reflected the America's idealistic and pragmatic approach towards China at the turn of the twentieth century, and built the foundation for the establishment of the BISP. The U.S. Government's repudiation of the Manchurian Bank Project and its preference for the BISP show American policymakers calculating their country's strategic position in the Far East and its relations with other powers operating there. This predilection further embodied the connection between the BISP and the diplomacy of the United States.

Through analyzing the respective processes of the materialization of the CEM and the BISP from the prospective of China-America relations, this paper refuted the assumption that the BISP was merely a follow-up project of the CEM. In fact, both the Chinese and American governments were fairly indifferent to the CEM when it was launched. The BISP, by contrast, was initiated amid the almost unanimous recognition of the beneficial effects of educating Chinese on America's interests in China. Such recognition was rooted in the principles of America's China policy, as well as in its strategic and realistic consideration of the power balance in the Asia-Pacific region. Hence, by presenting this fundamental difference, the paper identified the BISP as the roots of geopolitics at the heart of America's educational diplomacy with China, and revealed the evolving nature of the diplomatic relationship between China and the United States.

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Abstract

Idealism and Pragmatism: The Boxer Indemnity Scholarship Program and the Beginning of America's Educational Diplomacy with China

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Started from 1909 and set up to continue for thirty one years, the Boxer Indemnity Scholarship Program (hereafter the BISP) left a notable mark in the history of Sino-American relations. This educational scheme was funded by America's remission of a surplus of an indemnity stipulated to pay for the Boxer Rebellion, and it put American higher education within the reach of thousands of Chinese students. These students then assumed important positions after returning to China. Therefore, the BISP is widely considered the most important scheme for educating Chinese students in America, and could even be the most consequential and successful foreign study project in twentieth century China.

Despite the BISP's influence, however, many scholars have studied it outside the larger framework of Sino-American relations. Instead, it has been paired with the earlier Chinese Educational Mission (hereafter the CEM) terminated in 1881, which is China's first study abroad project in America, and understood within the context of Chinese student enrollments in America, or as America's second attempt at influencing China through education. However, considering the nearly three decades separating these two educational schemes, it seems that simply confining these two episodes to the field of education research is not enough. A new, broader perspective is required.

This paper places both the CEM and the BISP in the context of China-America relations. It shows that the fundamental differences between these two programs demonstrate the constantly dynamic relations between the United States and China. The CEM was largely a preliminary project launched by one individual's effort when neither China nor America had any particular interest

in building a relationship. The BISP, by contrast, was an American-led program aimed at promoting America's interests in China, reflected the idealism and pragmatism of America's China policy at the turn of the twentieth century, as well as its realism-based diplomacy in the Far East.

Through a comparison of the CEM and the BISP, this paper demonstrates the evolving nature of US-China relations in the late nineteenth and early twentieth centuries. Additionally and more importantly, it identifies when and why education became a tool for America's diplomacy with China.

Key Words: Boxer Indemnity Scholarship Program, Chinese Educational Mission, educational diplomacy, US-China relations